

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation**2003**

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

For calendar year **2003**, or tax year beginning , **2003**, and ending , **20**G Check all that apply ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.29504 *****AUTO**5-DIGIT 22901
LJ SANFORD TR FBO ST MATTHEW AND
SANFORD WILLIAM F JR TTEE
2030 WINGFIELD RD
CHARLOTTESVILLE VA 22901-8847

A Employer identification number

65:6142833

B Telephone number (see page 10 of the instructions)

(434) 293-7130

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 foundationI Fair market value of all assets at end
of year (from Part II, col. (c),
line 16) ▶ \$ **1,285,735**J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis)**Part I Analysis of Revenue and Expenses** (The total of
amounts in columns (b), (c), and (d) may not necessarily equal
the amounts in column (a) (see page 10 of the 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) Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
2 Distributions from split-interest trusts	847	847		
3 Interest on savings and temporary cash investments	36,780	36,780		
4 Dividends and interest from securities (St. 1)				
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		31,782		
7 Capital gain net income (from Part IV, line 2)				
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) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	37,627	69,409		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc.	9,331	4,665		4,666
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)				
17 Interest (St. 1)	74	74		
18 Taxes (attach schedule) (see page 13 of the instructions)				
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings (St. 3)	1,512	504		1,008
22 Printing and publications	27			27
23 Other expenses (attach schedule) (St. 3)				
24 Total operating and administrative expenses. Add lines 13 through 23	10,944	5,243		5,701
25 Contributions, gifts, grants paid (St. 4)	60,000			60,000
26 Total expenses and disbursements. Add lines 24 and 25	70,944	5,243		65,701
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	(33,317)			
b Net investment income (if negative, enter -0-)		64,166		
c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	(St. 5)			
	2	Savings and temporary cash investments	(St. 5)	70,214	34,979	34,979
	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 page 15 of the instructions)				
	7	Other notes and loans receivable (attach schedule) ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule) (St. 5)		728,734	555,421	913,145
	c	Investments—corporate bonds (attach schedule) (St. 5)		80,000	287,013	337,611
	11	Investments—land, buildings, and equipment, basis ▶				
Liabilities		Less: accumulated depreciation (attach schedule) ▶				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment, basis ▶				
		Less: accumulated depreciation (attach schedule) ▶				
	15	Other assets (describe ▶)				
	16	Total assets (to be completed by all filers—see page 16 of the instructions. Also, see page 1, item I)		878,948	877,413	1,285,735
	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
Net Assets or Fund Balances	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	
		Organizations that follow SFAS 117, check here ▶ <input type="checkbox"/>				
		and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Organizations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>				
		and complete lines 27 through 31.				
Net Assets or Fund Balances	27	Capital stock, trust principal, or current funds		878,948	877,413	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances (see page 17 of the instructions)		878,948	877,413	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)		878,948	877,413	

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	878,948
2	Enter amount from Part I, line 27a.	2	(33,317)
3	Other increases not included in line 2 (itemize) ▶ capital gains, Part IV	3	31,782
4	Add lines 1, 2, and 3	4	877,413
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 30.	6	877,413

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 Security sales (Statement 2)		P		
b Mutual fund sales ("")		P		
c Mutual fund capital gains distributions		P		
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 153,171.59		73,591.13	79,580.46
b 486,683.02		536,378.82	(49,795.80)
c			1,997.74
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			
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 }	2	31,782.40
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 pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	

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 page 17 of the 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))
2002	66,496	1,207,329	0.0551
2001	68,565	1,313,389	0.0522
2000	69,003	1,363,457	0.0506
1999	69,778	1,367,724	0.0510
1998	58,581	1,224,007	0.0479

2 Total of line 1, column (d)	2	0.2568
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	0.05136
4 Enter the net value of noncharitable-use assets for 2003 from Part X, line 5	4	1,131,146
5 Multiply line 4 by line 3	5	58,096
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	642
7 Add lines 5 and 6	7	58,738
8 Enter qualifying distributions from Part XII, line 4	8	65,701

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 on page 17

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 17 of the 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)		1	642
b Domestic organizations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	
c All other domestic organizations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	642
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
3 Add lines 1 and 2		5	642*
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		7	0
6 Credits/Payments:		8	
a 2003 estimated tax payments and 2002 overpayment credited to 2003	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		0*
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 2004 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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 18 of the instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the organization in connection with the activities.</i>		X
c Did the organization file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the organization. ► \$ (2) On organization managers. ► \$		
e Enter the reimbursement (if any) paid by the organization during the year for political expenditure tax imposed on organization managers. ► \$		
2 Has the organization engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		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? <i>If "Yes," attach a conformed copy of the changes</i>		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?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		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? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ►		
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? <i>If "No," attach explanation</i>	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 2003 or the taxable year beginning in 2003 (see instructions for Part XIV on page 25)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		X
11 Did the organization comply with the public inspection requirements for its annual returns and exemption application? Web site address ► N/A	X	
12 The books are in care of ► William F. Sanford, Jr. Telephone no. ► (434) 293-7130 Located at ► 2030 Wingfield Road, Charlottesville, VA ZIP+4 ► 22901-8847		
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. ► 13		

*No tax is presently due. Trust is in a 60 month termination period. See attached copies of IRS ruling and signed consent (Form 872-B).

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)? **1b** ☐ Yes ☒ No
Organizations relying on a current notice regarding disaster assistance check here ☐
- 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 2003? **1c** ☐ Yes ☒ No
- 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 2003, did the organization have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2003? ☐ Yes ☒ No
If "Yes," list the years **►** 20...., 20...., 20...., 19....
- 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 page 19 of the instructions.) **2b** ☐ Yes ☒ No
- c** If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here.
► 20...., 20...., 20...., 19....
- 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 2003 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 2003.) **3b** ☐ Yes ☒ No
- 4a** Did the organization invest during the year any amount in a manner that would jeopardize its charitable purposes? **4a** ☐ Yes ☒ No
- 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 2003? **4b** ☐ Yes ☒ No
- 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 page 20 of the instructions)? **5b** ☐ Yes ☒ No
Organizations relying on a current notice regarding disaster assistance check here ☐
- 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? **6b** ☐ Yes ☒ No
If you answered "Yes" to 6b, also file Form 8870.

	Yes	No
1b		X
1c		X
2b		N/A
3b		N/A
4a		X
4b		X
5b		N/A
6b		X

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see page 20 of the 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
William F. Sanford, Jr. 2030 Wingfield Road Charlottesville, VA 22901	Trustee 5	9,331	None	1,539

2 Compensation of five highest-paid employees (other than those included on line 1—see page 20 of the instructions). If none, enter "NONE."

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

Total number of other employees paid over \$50,000. ▶ 0**3 Five highest-paid independent contractors for professional services—(see page 20 of the instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant 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 IX-B Summary of Program-Related Investments (see page 21 of the 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 page 21 of the instructions	
3	
Total. Add lines 1 through 3	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 21 of the 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 (see Statement 6)	1a	1,048,303
b Average of monthly cash balances	1b	100,069
c Fair market value of all other assets (see page 22 of the instructions)	1c	
d Total (add lines 1a, b, and c)	1d	1,148,372
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	1,148,372
4 Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see page 23 of the instructions)	4	17,226
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,131,146
6 Minimum investment return. Enter 5% of line 5	6	56,557

Part XI Distributable Amount (see page 23 of the 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	56,557
2a Tax on investment income for 2003 from Part VI, line 5	2a	0*	
b Income tax for 2003. (This does not include the tax from Part VI.)	2b		
c Add lines 2a and 2b		2c	0*
3 Distributable amount before adjustments. Subtract line 2c from line 1		3	56,557
4a Recoveries of amounts treated as qualifying distributions	4a		
b Income distributions from section 4947(a)(2) trusts	4b		
c Add lines 4a and 4b		4c	
5 Add lines 3 and 4c		5	56,557
6 Deduction from distributable amount (see page 23 of the instructions)		6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	56,557

Part XII Qualifying Distributions (see page 23 of the 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	65,701
b Program-related investments—Total from Part IX-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 V, line 8, and Part XIII, line 4	4	65,701
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 (see page 24 of the instructions)	5	642
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	65,059

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.

* See Part VI, line 9 and footnote.

Part XIII Undistributed Income (see page 24 of the instructions)

	(a) Corpus	(b) Years prior to 2002	(c) 2002	(d) 2003
1 Distributable amount for 2003 from Part XI, line 7				56,557
2 Undistributed income, if any, as of the end of 2002:				
a Enter amount for 2002 only				
b Total for prior years: 20____, 20____, 19____				
3 Excess distributions carryover, if any, to 2003:				
a From 1998				0
b From 1999				1,809
c From 2000				830
d From 2001				2,896
e From 2002				6,306
f Total of lines 3a through e	11,841			
4 Qualifying distributions for 2003 from Part XII, line 4: ▶ \$ <u>65,701</u>				
a Applied to 2002, but not more than line 2a.				
b Applied to undistributed income of prior years (Election required—see page 24 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 24 of the instructions)				
d Applied to 2003 distributable amount				56,557
e Remaining amount distributed out of corpus	9,144			
5 Excess distributions carryover applied to 2003 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	20,985			
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 page 24 of the instructions				
e Undistributed income for 2002. Subtract line 4a from line 2a. Taxable amount—see page 24 of the instructions				
f Undistributed income for 2003. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2004.				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) (see page 25 of the instructions).				
8 Excess distributions carryover from 1998 not applied on line 5 or line 7 (see page 25 of the instructions).	0			
9 Excess distributions carryover to 2004. Subtract lines 7 and 8 from line 6a	20,985			
10 Analysis of line 9:				
a Excess from 1999	1,809			
b Excess from 2000	830			
c Excess from 2001	2,896			
d Excess from 2002	6,306			
e Excess from 2003	9,144			

Part XIV Private Operating Foundations (see page 25 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2003, enter the date of the ruling	N/A				
b Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2003	(b) 2002	(c) 2001	(d) 2000	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—Enter % of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 25 of the instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

N/A

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.

N/A

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the organization only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the organization makes gifts, grants, etc. (see page 25 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed.

N/A

b The form in which applications should be submitted and information and materials they should include:

N/A

c Any submission deadlines:

N/A

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

N/A

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?

(1) Cash	
(2) Other assets	

(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	

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.

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
--------------------------	--------------------------	---------------------------------

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 tax practitioner) 1

Signature of officer or trustee

Preparer's signature 

Firm's name (or yours if self-employed), address, and ZIP code



Consent to Extend the Time to Assess
Miscellaneous Excise Taxes

Leonard J. Sanford Trust FBO St. Matthew and St. Timothy, taxpayer(s)
(Name(s))
of 2030 Wingfield Road Charlottesville, Va 22901-8847 and the
(Number, Street, City or Town, State, ZIP Code)

District Director of Internal Revenue or Regional Director of Appeals consent and agree to the following:

- (1) The amount of liability for excise tax based on investment income tax, imposed on the taxpayer(s) by
(Kind)
section 4940 of the Internal Revenue Code of 1986 due for the period of 60 months commencing
(Internal Revenue Code, Revenue Act, etc.)
the date described on the reverse
(Expiration date)
may be assessed at any time on or before
- (2) The collection provisions and limitations now in effect will also apply to any tax assessed within the extended period.
- (3) The taxpayer(s) may file a claim for credit or refund and the Service may credit or refund the tax within 6 months after this agreement ends.

If this consent is for a partnership return, only one authorized partner need sign.

If you are an attorney or agent of the taxpayer(s), you may sign this consent, provided the action is specifically authorized by a power of attorney. If the power of attorney was not previously filed, please include it with this form.

If you are acting as a fiduciary (such as executor, administrator, trustee, etc.) and you sign this consent, include Form 56, Notice Concerning Fiduciary Relationship, unless it was previously filed.

If the taxpayer is a corporation, sign this consent with the corporate name followed by the signature and title of the officer(s) authorized to sign.

MAKING THIS CONSENT WILL NOT DEPRIVE THE TAXPAYER(S) OF ANY APPEAL RIGHTS TO WHICH THEY WOULD OTHERWISE BE ENTITLED.

YOUR
SIGNATURE
HERE



(Date signed)

TAXPAYER'S
REPRESENTATIVE
SIGN HERE



(Date signed)

CORPORATE
NAME:



Leonard J. Sanford Trust FBO The Church
of St. Matthew and St. Timothy

CORPORATE
OFFICERS
SIGN HERE



W. Sanford, Jr., TREAS.
(Title)

(Title)

4/5/00

(Date signed)

(Date signed)

Steven D. Miller
DISTRICT DIRECTOR OF INTERNAL REVENUE

REGIONAL DIRECTOR OF APPEALS

BY R. M. H. CO. R. M. H.
(Signature and Title)

APR 17 2000
(Date signed)

This consent is made pursuant to section 6501(c)(4) of the Internal Revenue Code and is part of a request for a ruling that the above designated organization be treated as a publicly supported organization within the meaning of section 509(a)(3) during an advance ruling period. The period of limitation upon assessment of the tax imposed under section 4940 of the Code for any taxable year within the advance ruling period shall not expire prior to one year from the date of expiration of the time prescribed by law for the assessment of a deficiency for the last taxable year within the advance ruling period, except that if a notice of deficiency in tax such period, the time for making an assessment shall be further extended for the period in which the making of an assessment is prohibited and for 60 days thereafter.

STATEMENT 1

LJS TRUST FBO CHURCH OF SAINT MATTHEW & SAINT TIMOTHY

SUMMARY OF INCOME, 2003

<u>Assets</u>	<u>Interest or Dividends</u>	<u>Capital Gains Distributions</u>	<u>Non-Taxable</u>	<u>Earnings</u>	<u>For.</u>
		<u>Sh Term</u> <u>L Term</u>	<u>Distributions</u>	<u>from For.</u>	<u>Taxes</u>
				<u>Securities</u>	<u>Paid</u>
CASH INVESTMENTS					
Mutual Funds					
FidCashReserves(USA)	438.08				
FidCashReserves	214.25				
FidSelMM	194.32				
TOTALS	846.65				
SECURITY INVESTMENTS					
IndividualSecurities					
AbbottLabs	1,305.00				
AIG	179.20				
BakerHughes	172.50				
Bank of America	864.00				
Deere	88.00				
ExxonMobil	1,568.00				
FreeportMcMoran	324.00				
GeneralElectric	1,026.00				
IBM	378.00				
Johnson & Johnson	1,110.00				
NewmontMining	102.00				
TJX	135.00				
Weyerhaeuser	480.00				
Subtotals	7,731.70				
Mutual Funds					
FidCap&Income	8,023.18				
FidHighIncome	7,874.13				
FidIntlG&I	135.11			135.11	17.62
FidLowPriceStock	72.32	325.45	1,265.64		
FidNewMktInc	6,173.91		406.65		
FidPacBasin	152.15			152.15	12.04
FidSelGold	6,600.52			6,600.52	44.79
FidSelIndMaterials	17.70				
FidSelNatResources	0.00				
Subtotals	29,049.02	325.45	1,672.29	6,887.78	74.45
TOTALS	36,780.72	325.45	1,672.29	6,887.78	74.45

STATEMENT 2

LJS TRUST FBO CHURCH OF SAINT MATTHEW & SAINT TIMOTHY

2003 CAPITAL GAINS (LOSSES)

<u>Description</u>	<u>Date Acquired</u>	<u>Date Sold</u>	<u>Sales Price</u>	<u>Cost</u>	<u>Short-Term Gain (Loss)</u>	<u>Long-Term Gain (Loss)</u>
SECURITY SALES						
Abbott Laboratories						
600	5/24/93	1/27/03	21,918.33	8,456.25		13,462.08
American International Group						
400	5/24/93	1/27/03	21,916.33	5,293.87		16,622.46
Baker Hughes						
500	3/27/02	10/28/03	13,984.34	19,160.00		(5,175.66)
Deere						
400	3/27/02	1/27/03	16,600.49	18,011.00	(1,410.51)	
General Electric						
600	5/24/93	1/27/03	13,650.58	4,621.88		9,028.70
IBM						
200	5/24/93	1/27/03	15,608.52	2,459.38		13,149.14
Johnson & Johnson						
400	5/24/93	1/27/03	20,776.37	4,518.75		16,257.62
Sierra Wireless						
1,000	1/14/03	9/26/03	13,672.35	5,535.00	8,137.35	
1,000	1/14/03	12/08/03	15,044.28	5,535.00	9,509.28	
Subtotals			153,171.59	73,591.13	16,236.12	63,344.34
MUTUAL FUND SALES						
Fidelity Real Estate Investment						
4,147.227	3/04/02	1/14/03	75,313.64	80,000.00	(4,686.36)	
2.157	3/08/02	1/14/03	39.17	41.47	(2.30)	
51.759	3/08/02	1/14/03	939.95	995.33	(55.38)	
4.645	12/20/03	1/14/03	84.35	84.02	0.33	
37.158	12/20/03	1/14/03	674.79	672.18	2.61	
4,242.946			77,051.90	81,793.00	(4,741.10)	
Fidelity Select Technology						
737.536	3/18/03	5/20/03	32,178.57	29,685.82	2,492.75	
737.536			32,178.57	29,685.82	2,492.75	
Fidelity Select Telecommunications						
1,034.840	1/07/03	1/29/03	25,751.64	30,000.00	(4,248.36)	
1,034.840			25,751.64	30,000.00	(4,248.36)	

STATEMENT 2 (Cont.)

-2-

<u>Description</u>	<u>Date Acquired</u>	<u>Date Sold</u>	<u>Sales Price</u>	<u>Cost</u>	<u>Short-Term Gain (Loss)</u>	<u>Long-Term Gain (Loss)</u>
MUTUAL FUND SALES (Cont.)						
Fidelity Small Cap Independence						
4,781.829	3/04/02	1/07/03	64,554.69	80,000.00	(15,445.31)	
4,781.829			64,554.69	80,000.00	(15,445.31)	
Fidelity Value						
1,595.745	1/30/01	1/27/03	70,643.63	75,000.00		(4,356.37)
1,595.745			70,643.63	75,000.00		(4,356.37)
Rydex Arktos						
1,261.670	1/27/03	3/18/03	44,753.77	50,000.00	(5,246.23)	
1,164.822	5/20/03	9/03/03	32,127.62	40,000.00	(7,872.38)	
1,057.455	9/25/03	10/28/03	27,665.45	30,000.00	(2,334.55)	
3,483.947			104,546.84	120,000.00	(15,453.16)	
Rydex Ursa						
3,782.148	1/27/03	3/18/03	48,161.49	50,000.00	(1,838.51)	
3,344.482	5/20/03	9/03/03	35,335.29	40,000.00	(4,664.71)	
2,762.431	9/25/03	10/28/03	28,458.97	30,000.00	(1,541.03)	
9,889.061			111,955.75	120,000.00	(8,044.25)	
Subtotals			486,683.02	536,478.82	(45,439.43)	(4,356.37)
TOTALS			639,854.61	610,069.95	(29,203.31)	58,987.97
MUTUAL FUND CAPITAL GAINS DISTRIBUTIONS						
Fidelity Low Price Stock Fund						
9.522	12/19/03				325.45	
37.029	12/19/03					1,265.64
Fidelity New Markets Income						
29.276	12/26/03					406.65
Subtotals					325.45	1,672.29
COMBINED GAINS (LOSSES)					(28,877.86)	60,660.26

STATEMENT 3

LJS TRUST FBO CHURCH OF SAINT MATTHEW & SAINT TIMOTHY

TRUST EXPENSES, 2003

Trustee	10,869.67
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OFFICIAL TRIPS	1,511.87 ¹
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New York, NY 5/22-5/24	699.77
Airline Tickets	680.00
Lodging	458.14
Meals	162.40
Parking (C'ville)	18.00
Taxis & tips	81.00

Subtotal:	1,399.54 ÷ 2
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New York, NY 10/29-10/31	812.10
Airline tickets	534.67
Lodging	638.02
Meals	373.51
Parking (C'ville)	18.00
Taxis & tips	60.00

Subtotal:	1,624.20 ÷ 2
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SALARY	9,330.98 ²
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Payment for managing trust for
calendar year 2002, based on year-
end portfolio value of \$1,116,196.

MISCELLANEOUS	26.82 ³
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Copying & Mailing Costs	25.01
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Official Telephone Calls	1.81
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TOTAL EXPENSES	\$10,869.97
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¹ Paid from L. J. Sanford Trust, December 31, 2003.

² Paid from L. J. Sanford Trust, January 22, 2003.

³ Paid from L. J. Sanford Trust, December 31, 2003.

STATEMENT 4

FUNDS PAID TO ST. MATTHEW'S CHURCH IN 2003

<u>Date</u>	<u>Amount</u>	<u>Purpose</u>
3/17/03	\$15,000.00	Unrestricted
6/18/03	\$15,000.00	Unrestricted
9/22/03	\$15,000.00	Unrestricted
12/09/03	\$15,000.00	Unrestricted
TOTAL	\$60,000.00	

STATEMENT 5

LJS TRUST FBO CHURCH OF SAINT MATTHEW & SAINT TIMOTHY

TRUST INVESTMENTS, 2003

	Beginning <u>Book</u>	Ending <u>Book</u>	Ending <u>FMV</u>
TEMPORARY CASH INVESTMENTS			
<i>Mutual Funds</i>			
FidCashReserves(USA)	7,538.33	23,275.54	23,275.54
FidCashReserves	28,741.58	9,385.21	9,385.21
FidSelectMoneyMkt	33,934.18	2,318.30	2,318.30
TOTALS	70,214.09	34,979.05	34,979.05
STOCK INVESTMENTS			
<i>Individual Securities</i>			
1,200 Abbott Labs	25,368.75	16,912.50	55,920.00
800 AIG	15,881.60	10,587.73	53,024.00
500 Baker Hughes	19,160.00	15,010.00	16,080.00
300 Bank of America	20,834.00	20,834.00	24,129.00
400 Deere	18,011.00	24,683.00	26,020.00
1,600 Exxon Mobil	70,713.25	70,713.25	65,600.00
1,200 Freeport McMoran	20,418.00	20,418.00	50,556.00
1,200 Gen Electric	13,865.63	9,243.75	37,176.00
600 IBM	9,837.50	7,378.12	55,608.00
1,200 Johnson & Johnson	18,075.00	13,556.25	61,992.00
600 Newmont Mining	15,665.00	15,665.00	29,166.00
600 Pfizer	0.00	20,123.00	21,198.00
200 Procter & Gamble	0.00	19,477.00	19,976.00
1,000 TJX	19,300.00	19,300.00	22,050.00
300 Weyerhaeuser	18,689.00	18,689.00	19,200.00
Subtotals	285,818.73	302,590.60	557,695.00
<i>Mutual Funds</i>			
FidIntlGrowth&Inc	0.00	15,117.49	15,737.40
FidLowPriceStock	81,670.39	83,261.48	128,120.09
FidRealEstate	81,793.00	0.00	0.00
FidPacificBasin	0.00	15,000.00	15,350.27
FidSelectGold	85,246.11	85,246.11	137,716.55
FidSelectIndMaterials	0.00	15,000.00	15,929.21
FidSelectNatResources	39,205.48	39,205.48	42,596.54
FidSmallCapIndepend	80,000.00	0.00	0.00
FidValue	75,000.00	0.00	0.00
Subtotals	442,914.98	252,830.56	355,450.06
TOTALS	728,733.71	555,421.16	913,145.06

STATEMENT 5

-2-

	Beginning <u>Book</u>	Ending <u>Book</u>	Ending <u>FMV</u>
BOND INVESTMENTS			
<i>Mutual Funds</i>			
FidCap&Income	0.00	94,554.69	114,051.81
FidHighIncome	0.00	97,051.90	110,103.68
FidNewMktsIncome	80,000.00	95,406.65	113,455.90
TOTALS	80,000.00	287,013.24	337,611.39

STATEMENT 6

LJS TRUST FBO CHURCH OF SAINT MATTHEW & SAINT TIMOTHY

AVERAGE MONTHLY BALANCES, 2003

<u>Date</u>	<u>Cash</u>	<u>Securities</u>
1/01/03	70,214	1,044,440
1/31/03	128,100	951,140
2/01/03	128,100	951,140
2/28/03	130,069	931,768
3/01/03	130,069	931,768
3/31/03	180,922	867,188
4/01/03	180,922	867,188
4/30/03	120,163	980,378
5/01/03	120,163	980,378
5/31/03	74,611	1,067,536
6/01/03	74,611	1,067,536
6/30/03	62,459	1,077,296
7/01/03	62,459	1,077,296
7/31/03	64,414	1,088,991
8/01/03	64,414	1,088,991
8/31/03	66,619	1,117,109
9/01/03	66,619	1,117,109
9/30/03	62,025	1,125,133
10/01/03	62,025	1,125,133
10/31/03	128,332	1,099,073
11/01/03	128,332	1,099,073
11/30/03	130,515	1,126,425
12/01/03	130,515	1,126,425
12/31/03	34,979	1,250,757
Totals	2,401,651	25,159,271
	÷24	÷24
Average Monthly Balances	100,068.79	1,048,302.90

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

► File a separate application for each return.

- If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box ☒ **Part I**
 - If you are filing for an Additional (not automatic) 3-Month Extension, complete only Part II (on page 2 of this form).
- Note: Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**

Part I Automatic 3-Month Extension of Time—Only submit original (no copies needed)
Note: Form 990-T corporations requesting an automatic 6-month extension—check this box and complete Part I only ☐
All other corporations (including Form 990-C filers) must use Form 7004 to request an extension of time to file income tax returns. Partnerships, REMICs and trusts must use Form 8736 to request an extension of time to file Form 1065, 1066, or 1041.

Type or print File by the due date for filing your return. See instructions.	Name of Exempt Organization L.J. Sanford Trust FBO St. Matthew's Church	Employer identification number 65 6142833
	Number, street, and room or suite no. If a P.O. box, see instructions.	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	

Check type of return to be filed (file a separate application for each return):

- | | | |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-T (corporation) | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above) | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 8870 |

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6-month, for 990-T corporation) extension of time until August 15, 2004 to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year 2003. or
► ☐ tax year beginning , 20 . . . , and ending , 20 . . .

2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions \$ 0.00
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit \$ 0.00
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions \$ 0.00

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ► W. J. Sanford Title ► TTEE Date ► 5/14/04
For Paperwork Reduction Act Notice, see Instruction Cat. No. 27916D Form **8868** (12-2000)

- If you are filing for an Additional (not automatic) 3-Month Extension, complete only Part II and check this box ☒ **Note: Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.**
- If you are filing for an Automatic 3-Month Extension, complete only Part I (on page 1).

Part II Additional (not automatic) 3-Month Extension of Time—Must File Original and One Copy.

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization L.J. Sanford Trust FBO St. Matthew's	Employer identification number 65-6142833
	Number, street, and room or suite no. If a P.O. box, see instructions. 2030 Wingfield Road	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. Charlottesville, VA 22901-8847	

Check type of return to be filed (File a separate application for each return):

- ☐ Form 990 ☐ Form 990-EZ ☐ Form 990-T (sec. 401(a) or 408(a) trust) ☐ Form 1041-A ☐ Form 5227 ☐ Form 8870
☐ Form 990-BL ☒ Form 990-PF ☐ Form 990-T (trust other than above) ☐ Form 4720 ☐ Form 6069

STOP: Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

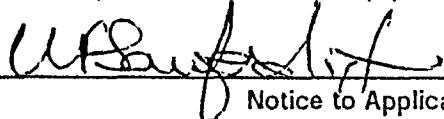
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until November 15, 2004
- 5 For calendar year 2003, or other tax year beginning _____, 20____ and ending _____, 20____.
- 6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension I need additional time this year to prepare a complete and accurate return.
- 8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See Instructions \$ 0.00
- b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868 \$ 0.00
- c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See Instructions \$ 0.00

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶



Title ▶

TTEE

Date ▶

8/14/04

Notice to Applicant—To Be Completed by the IRS

- ☒ We have approved this application. Please attach this form to the organization's return.
- ☐ We have not approved this application. However, we have granted a 10-day grace period from the later of the date shown below or the due date of the organization's return (including any prior extensions). This grace period is considered to be a valid extension of time for elections otherwise required to be made on a timely return. Please attach this form to the organization's return.
- ☐ We have not approved this application. After considering the reasons stated in item 7, we cannot grant your request for an extension of time to file. We are not granting a 10-day grace period.
- ☐ We cannot consider this application because it was filed after the due date of the return for which an extension was requested.
- ☐ Other _____

EXTENSION APPROVED**AUG 13 2004**FIELD DIRECTOR,
SUBMISSION PROCESSING, OGDEN

Director

By: _____

Date

Alternate Mailing Address — Enter the address if you want the copy of this application for an additional 3-month extension returned to an address different than the one entered above.

Type or print	Name
	Number and street (include suite, room, or apt. no.) Or a P.O. box number
	City or town, province or state, and country (including postal or ZIP code)