

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 1545-0052  
**2018**  
**Open to Public Inspection**

**For calendar year 2018, or tax year beginning 01-01-2018, and ending 12-31-2018**

Name of foundation LUMOS		<b>A Employer identification number</b> 20-8203226	
Number and street (or P O box number if mail is not delivered to street address) 3502 SCARSDALE ROAD		Room/suite	
		<b>B Telephone number (see instructions)</b> (615) 783-0101	
City or town, state or province, country, and ZIP or foreign postal code NASHVILLE, TN 37215			
<b>G</b> Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>  <b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <u>3,325,277</u>		<b>J</b> Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis)</i>	

<b>Part I Analysis of Revenue and Expenses</b> <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments	150	150		
	<b>4</b> Dividends and interest from securities	81,835	81,835		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	140,495			
	<b>b</b> Gross sales price for all assets on line 6a	1,550,865			
	<b>7</b> Capital gain net income (from Part IV, line 2)		140,495		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)					
<b>12 Total.</b> Add lines 1 through 11	222,480	222,480			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc	80,549	20,137		60,412
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits	29,208	7,302		23,161
	<b>16a</b> Legal fees (attach schedule)				
	<b>b</b> Accounting fees (attach schedule)	4,600	0		4,600
	<b>c</b> Other professional fees (attach schedule)	35,663	35,663		0
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)	3,181	0		0
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings	259	0		259
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (attach schedule)	485	301		184
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	153,945	63,403		88,616
	<b>25</b> Contributions, gifts, grants paid	87,042			87,042
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	240,987	63,403		175,658	
<b>27</b> Subtract line 26 from line 12					
<b>a Excess of revenue over expenses and disbursements</b>	-18,507				
<b>b Net investment income</b> (if negative, enter -0-)		159,077			
<b>c Adjusted net income</b> (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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .			
	<b>2</b> Savings and temporary cash investments . . . . .	384,423	864,562	864,562
	<b>3</b> Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .	1,513	1,673	1,673
	<b>10a</b> Investments—U S and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	3,187,688	2,438,771	2,438,771
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	116,138	19,960	19,960
	<b>11</b> Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .			
	<b>14</b> Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)	404	311	311	
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	3,690,166	3,325,277	3,325,277	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	4,030	4,030	
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)	15,353	10,902	
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	19,383	14,932	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	<b>24</b> Unrestricted . . . . .	3,670,783	3,310,345	
	<b>25</b> Temporarily restricted . . . . .			
	<b>26</b> Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here</b> <input type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	<b>27</b> Capital stock, trust principal, or current funds . . . . .			
	<b>28</b> Paid-in or capital surplus, or land, bldg , and equipment fund			
<b>29</b> Retained earnings, accumulated income, endowment, or other funds				
<b>30 Total net assets or fund balances</b> (see instructions) . . . . .	3,670,783	3,310,345		
<b>31 Total liabilities and net assets/fund balances</b> (see instructions) .	3,690,166	3,325,277		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	3,670,783
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-18,507
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	6,978
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	3,659,254
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	348,909
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	<b>6</b>	3,310,345

**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.)
<b>1 a PUBLICLY-TRADED SECURITIES</b>	P		
b			
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 1,550,865		1,410,370	140,495
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			140,495
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	140,495
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	

**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 foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	173,516	3,526,086	0.049209
2016	177,078	3,335,932	0.053082
2015	177,151	3,554,354	0.049841
2014	168,554	3,583,223	0.047040
2013	156,053	3,389,675	0.046038

2 Total of line 1, column (d)	2	0.245210
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.049042
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	3,603,387
5 Multiply line 4 by line 3	5	176,717
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,591
7 Add lines 5 and 6	7	178,308
8 Enter qualifying distributions from Part XII, line 4	8	175,658

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

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

Table with 11 rows for excise tax calculations. Includes fields for exempt foundations, domestic foundations, tax under section 511, subtitle A tax, and credits/payments. Total tax due is 2,528.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, political expenditures, unrelated business income, and substantial contributors. Includes Yes/No columns.

Part VII-A Statements Regarding Activities (continued)

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.
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
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address HTTP //BLOGS BELMONT EDU/LUMOS/
14 The books are in care of CYNTHIA LEU Telephone no (615) 783-0101
Located at 3502 SCARDSALE RD NASHVILLE TN ZIP+4 37215
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 2018, 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

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 foundation (either directly or indirectly)
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?
(6) Agree to pay money or property to a government official? (Exception. Check "No" 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 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 instructions
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? If "Yes," list the years
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement-see instructions )
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
b If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018 ).
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?



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

<b>3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".</b>		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
<b>Total number of others receiving over \$50,000 for professional services.</b>		<b>0</b>

**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
<b>1</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**Part IX-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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3	<b>0</b>

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities.	<b>1a</b>	3,039,973
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	618,288
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	3,658,261
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets.	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d.	<b>3</b>	3,658,261
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	54,874
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	3,603,387
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	180,169

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

<b>1</b>	Minimum investment return from Part X, line 6.	<b>1</b>	180,169
<b>2a</b>	Tax on investment income for 2018 from Part VI, line 5.	<b>2a</b>	3,182
<b>b</b>	Income tax for 2018 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	3,182
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	176,987
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	0
<b>5</b>	Add lines 3 and 4.	<b>5</b>	176,987
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	176,987

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	<b>1a</b>	175,658
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required).	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	175,658
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	175,658

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

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

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
<b>1</b> Distributable amount for 2018 from Part XI, line 7				176,987
<b>2</b> Undistributed income, if any, as of the end of 2018				
<b>a</b> Enter amount for 2017 only. . . . .			87,042	
<b>b</b> Total for prior years 20___, 20___, 20___		0		
<b>3</b> Excess distributions carryover, if any, to 2018				
<b>a</b> From 2013. . . . .				
<b>b</b> From 2014. . . . .				
<b>c</b> From 2015. . . . .				
<b>d</b> From 2016. . . . .				
<b>e</b> From 2017. . . . .				
<b>f</b> Total of lines 3a through e. . . . .	0			
<b>4</b> Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>175,658</u>				
<b>a</b> Applied to 2017, but not more than line 2a			87,042	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2018 distributable amount. . . . .				88,616
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a) )	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .		0		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .		0		
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019 . . . . .				88,371
<b>7</b> 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). . . . .	0			
<b>8</b> Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions). . . . .	0			
<b>9</b> Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a . . . . .	0			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2014. . . . .				
<b>b</b> Excess from 2015. . . . .				
<b>c</b> Excess from 2016. . . . .				
<b>d</b> Excess from 2017. . . . .				
<b>e</b> Excess from 2018. . . . .				

**Part XIV Private Operating Foundations** (see 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 2018, enter the date of the ruling. . . . . ▶

**b** Check box to indicate whether the organization is a private operating foundation described in section  4942(j)(3) or  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) 2018	(b) 2017	(c) 2016	(d) 2015	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, 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					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> 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 X, line 6 for each year listed. . . . .					
<b>c</b> "Support" alternative test—enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

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

**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) )

**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

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

Check here  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.

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

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

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**c** Any submission deadlines

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

**Part XV 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)				
<b>a Paid during the year</b> BELMONT UNIVERSITY 1900 BELMONT BLVD NASHVILLE, TN 37212	N/A	501(C)(3)	ENDOWMENT FOR LUMOS TRAVEL SCHOLARSHIPS	87,042
<b>Total . . . . .</b>				<b>▶ 3a</b>
<b>b Approved for future payment</b>				
<b>Total . . . . .</b>				<b>▶ 3b</b>





**TY 2018 Accounting Fees Schedule****Name:** LUMOS**EIN:** 20-8203226

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ACCOUNTING FEES	4,600	0		4,600

**TY 2018 Investments Corporate Bonds Schedule****Name:** LUMOS**EIN:** 20-8203226**Investments Corporate Bonds Schedule**

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
LEHMAN BROS HLDG CP TR V	162	162
PREFERRED PLUS TR SRS CZN-1 CITIZENS COMM CO	19,798	19,798

**TY 2018 Investments Corporate Stock Schedule****Name:** LUMOS**EIN:** 20-8203226**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
AB LARGE CAP GROWTH, 5,037 SHARES	245,764	245,764
ABBOTT LABS, 600 SHARES	43,398	43,398
ABIOMED INC COM, 7 SHARES	2,275	2,275
ACTIVISION BLIZZARD INC, 63 SHARES	2,934	2,934
ADOBE INC, 9 SHARES	2,036	2,036
ADVNC D MICRO D INC, 76 SHARES	1,403	1,403
ALPHABET INC SHS CL C, 15 SHARES	15,534	15,534
ALTRIA GROUP INC, 500 SHARES	24,695	24,695
ALTRIA GROUP INC, 132 SHARES	6,519	6,519
AMAZON COM INC COM, 39 SHARES	58,577	58,577
AMAZON COM INC COM, 14 SHARES	21,028	21,028
AMERICAN WTR WKS CO INC, 650 SHARES	59,001	59,001
AMPHENOL CORP CL A NEW, 17 SHARES	1,377	1,377
APPLE INC, 693 SHARES	109,314	109,314
APPLE INC, 108 SHARES	17,036	17,036
APPLE INC, 85 SHARES	13,408	13,408
APPLIED MATERIAL INC, 89 SHARES	2,914	2,914
ATLISSIAN CORP PLC, 26 SHARES	2,313	2,313
BECTON DICKINSON CO, 19 SHARES	4,281	4,281
BERKSHIRE HATHAWAY INC, 36 SHARES	7,350	7,350
BLACKROCK INC, 25 SHARES	9,821	9,821
BOEING COMPANY, 31 SHARES	9,998	9,998
BOOKING HLDGS INC, 3 SHARES	5,167	5,167
BOSTON SCIENTIFIC CORP, 228 SHARES	8,058	8,058
CARNIVAL CORP PAIRED SHS, 260 SHARES	12,818	12,818
CHEVRON CORP, 62 SHARES	6,745	6,745
CINN FINCL CRP OHIO, 126 SHARES	9,755	9,755
CISCO SYSTEMS INC COM, 228 SHARES	9,879	9,879
COCA COLA COM, 121 SHARES	5,729	5,729
COMCAST CORP NEW CL A, 200 SHARES	6,810	6,810

## Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CONSTELLATION BRANDS INC, 13 SHARES	2,091	2,091
COSTAR GROUP INC COM, 9 SHARES	3,036	3,036
COSTCO WHOLESALE CRP DEL, 16 SHARES	3,259	3,259
CROWN CASTLE REIT INC, 47 SHARES	5,106	5,106
DELTA AIR LINES INC, 4,000 SHARES	199,600	199,600
DELTA AIR LINES INC, 792 SHARES	39,521	39,521
DELTA AIR LINES INC, 8 SHARES	399	399
DEXCOM INC, 57 SHARES	6,829	6,829
DIAGEO PLC SPSD ADR NEW, 71 SHARES	10,068	10,068
DOMINION ENERGY INC, 53 SHARES	3,787	3,787
DUKE ENERGY CORP NEW, 63 SHARES	5,437	5,437
ECOLAB INC, 4 SHARES	589	589
ELECTRONIC ARTS INC DEL, 6 SHARES	473	473
ELI LILLY & CO, 375 SHARES	43,395	43,395
EQUINIX INC, 5 SHARES	1,763	1,763
FACEBOOK INC, 10 SHARES	1,311	1,311
FASTENAL COMPANY, 171 SHARES	8,942	8,942
FRANKLIN RES INC, 190 SHARES	5,635	5,635
GENL DYNAMICS CORP COM, 42 SHARES	6,603	6,603
GRUBHUB INC SHS, 31 SHARES	2,381	2,381
HASBRO INC COM, 28 SHARES	2,275	2,275
HOME DEPOT INC, 300 SHARES	51,546	51,546
HOME DEPOT INC, 42 SHARES	7,216	7,216
HONEYWELL INTL INC DEL, 650 SHARES	85,878	85,878
HONEYWELL INTL INC DEL, 22 SHARES	2,907	2,907
ILLUMINA INC COM, 22 SHARES	6,598	6,598
INTEL CORP, 222 SHARES	10,418	10,418
INTERCONTINENTAL, 32 SHARES	2,411	2,411
INTL BKT ARN ISSUER CS, 18,000 SHARES	153,000	153,000
INTUITIVE SURGICAL INC, 21 SHARES	10,057	10,057

## Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
INVESCO QQQ TR SER 1, 500 SHARES	77,130	77,130
ISHARES SELECT, 225 SHARES	20,095	20,095
ISHARES U.S. REAL ESTATE, 600 SHARES	44,964	44,964
JOHNSON AND JOHNSON COM, 765 SHARES	98,723	98,723
JOHNSON AND JOHNSON COM, 81 SHARES	10,453	10,453
KINDER MORGAN INC. DEL, 283 SHARES	4,353	4,353
LAUDER ESTEE COS INC A, 40 SHARES	5,204	5,204
LOWE'S COMPANIES INC, 80 SHARES	7,389	7,389
LULULEMON ATHLETICA INC, 44 SHARES	5,351	5,351
MASTERCARD INC, 77 SHARES	14,526	14,526
MATCH GROUP INC, 60 SHARES	2,566	2,566
MERCADOLIBRE INC, 11 SHARES	3,221	3,221
MERCK AND CO INC SHS, 146 SHARES	11,156	11,156
MICROSOFT CORP, 250 SHARES	25,393	25,393
MICROSOFT CORP, 157 SHARES	15,946	15,946
MICROSOFT CORP, 75 SHARES	7,618	7,618
MONSTER BEVERAGE SHS, 56 SHARES	2,756	2,756
NATL HEALTH INVS INC, 2,000 SHARES	151,080	151,080
NESTLE S A REP RG SH ADR, 71 SHARES	5,748	5,748
NETFLIX COM INC, 160 SHARES	42,826	42,826
NETFLIX COM INC, 39 SHARES	10,439	10,439
NEWMARKET CORP, 17 SHARES	7,006	7,006
NORFOLK SOUTHERN CORP, 67 SHARES	10,019	10,019
NORFOLK SOUTHERN CORP, 19 SHARES	2,841	2,841
NVIDIA, 35 SHARES	4,673	4,673
PACCAR INC, 177 SHARES	10,114	10,114
PAYCHEX INC, 116 SHARES	7,557	7,557
PAYPAL HOLDINGS INC SHS, 119 SHARES	10,007	10,007
PFIZER INC, 261 SHARES	11,393	11,393
PHILIP MORRIS INTL INC, 44 SHARES	2,937	2,937

## Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PROCTER & GAMBLE CO, 150 SHARES	13,788	13,788
REGENERON PHARMACTCLS, 4 SHARES	1,494	1,494
ROCKWELL AUTOMATION INC, 7 SHARES	1,053	1,053
ROPER TECHNOLOGIES INC, 23 SHARES	6,130	6,130
ROSS STORES INC COM, 67 SHARES	5,574	5,574
S&P GLOBAL INC, 44 SHARES	7,477	7,477
SALESFORCE COM INC, 64 SHARES	8,766	8,766
SCHWAB CHARLES CORP NEW, 84 SHARES	3,489	3,489
SERVICENOW INC, 52 SHARES	9,259	9,259
SHERWIN WILLIAMS, 7 SHARES	2,754	2,754
SHOPIFY INC CL A, 15 SHARES	2,077	2,077
SOUTHWEST AIRLNS CO, 37 SHARES	1,720	1,720
SP500 CLIRN ISSUER BOFA, 6,700 SHARES	62,752	62,752
SQUARE INC SHS CL A, 51 SHARES	2,861	2,861
SVB FINL GROUP, 4 SHARES	760	760
SX5E CLIRN ISSUER HSBC, 5,000 SHARES	44,225	44,225
TARGET CORP COM, 77 SHARES	5,089	5,089
TESLA INC, 6 SHARES	1,997	1,997
TEXAS INSTRUMENTS, 61 SHARES	5,764	5,764
TEXAS INSTRUMENTS, 39 SHARES	3,686	3,686
THERMO FISHER SCIENTIFIC, 125 SHARES	27,974	27,974
THERMO FISHER SCIENTIFIC, 20 SHARES	4,476	4,476
TRADE (THE) DESK INC SHS, 22 SHARES	2,553	2,553
TWITTER INC, 75 SHARES	2,156	2,156
UNITED PARCEL SVC CL B, 90 SHARES	8,778	8,778
UNITEDHEALTH GROUP INC, 150 SHARES	37,368	37,368
UNITEDHEALTH GROUP INC, 37 SHARES	9,217	9,217
VEEVA SYS INC CL A, 29 SHARES	2,590	2,590
VERIZON COMMUNICATNS COM, 1,225 SHARES	68,869	68,869
VERIZON COMMUNICATNS COM, 160 SHARES	8,995	8,995

**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
VERTEX PHARMCTLS INC, 31 SHARES	5,137	5,137
VISA INC CL A SHRS, 67 SHARES	8,840	8,840
WAYFAIR INC, 18 SHARES	1,621	1,621
WELLS FARGO & CO NEW DEL, 261 SHARES	12,027	12,027
WORLDPAY INC CL A, 72 SHARES	5,503	5,503

**TY 2018 Other Assets Schedule****Name:** LUMOS**EIN:** 20-8203226**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
FEDERAL EXCISE TAX RECOVERABLE	404	0	0
PENDING TRADE ASSETS	0	311	311

**TY 2018 Other Decreases Schedule****Name:** LUMOS**EIN:** 20-8203226

<b>Description</b>	<b>Amount</b>
CHANGE IN UNREALIZED GAIN/LOSS	348,909

**TY 2018 Other Expenses Schedule****Name:** LUMOS**EIN:** 20-8203226**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT - BANK SERVICE CHARGE	301	301		0
OTHER MISCELLANEOUS EXPENSES	184	0		184

**TY 2018 Other Increases Schedule****Name:** LUMOS**EIN:** 20-8203226

<b>Description</b>	<b>Amount</b>
CHANGE IN DEFERRED FEDERAL EXCISE TAXES	6,978

**TY 2018 Other Liabilities Schedule****Name:** LUMOS**EIN:** 20-8203226

<b>Description</b>	<b>Beginning of Year - Book Value</b>	<b>End of Year - Book Value</b>
DEFERRED FEDERAL EXCISE TAX	15,353	8,375
FEDERAL EXCISE TAX PAYABLE	0	2,527

**TY 2018 Other Professional Fees Schedule****Name:** LUMOS**EIN:** 20-8203226

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
INVESTMENT MANAGER FEES	35,663	35,663		0

**TY 2018 Taxes Schedule****Name:** LUMOS**EIN:** 20-8203226

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
CURRENT FEDERAL EXCISE TAXES	3,181	0		0