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Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation**Note.** The foundation may be able to use a copy of this return to satisfy state reporting requirements**2009**

For calendar year 2009, or tax year beginning

, 2009, and ending

, 20

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation IRENE & TUCKER GRIGG FOUNDATION		A Employer identification number 54-1694119
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions)
	117 SHOCKOE SLIP		804-783-1488
City or town, state, and ZIP code RICHMOND, VA 23219		C If exemption application is pending, check here <input type="checkbox"/>	
H Check type of organization: <input 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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 278,979		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

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 11 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)				
	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	4252	4252		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	(6851)			
	b Gross sales price for all assets on line 6a 57,557				
	7 Capital gain net income (from Part IV, line 2)		-0-		
	8 Net short-term capital gain			-0-	
	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	(2599)	4252	-0-		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) SCH # 1	381			381
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule) SCH # 1	3227	3227		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	32	9		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) SCH # 1	25			25
	24 Total operating and administrative expenses. Add lines 13 through 23	3665	3236	-0-	406
	25 Contributions, gifts, grants paid	27,004			27,004
26 Total expenses and disbursements. Add lines 24 and 25	30,669	3236	-0-	27,410	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	(33,268)				
b Net investment income (if negative, enter -0-)		1016			
c Adjusted net income (if negative, enter -0-)			-0-		

2009

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	15,196	13,373	13,373
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 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) SCH # 2	252,465	221,020	265,606
	c Investments—corporate bonds (attach schedule)			
	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 the instructions. Also, see page 1, item I)	267,661	234,393	278,979
	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)			
	Foundations 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			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
Net Assets or Fund Balances	28 Paid-in or capital surplus, or land, bldg., and equipment fund	10,028	10,028	
	29 Retained earnings, accumulated income, endowment, or other funds	257,633	224,365	
	30 Total net assets or fund balances (see page 17 of the instructions)	267,661	234,293	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	267,661	234,293	

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	267,661
2 Enter amount from Part I, line 27a	2	(33,268)
3 Other increases not included in line 2 (itemize) ▶	3	-0-
4 Add lines 1, 2, and 3	4	234,393
5 Decreases not included in line 2 (itemize) ▶	5	-0-
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	234,393

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	SEE SCHEDULE #3			
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				
b				
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				
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	(6851)
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	1422

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.

(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))
2008	21,512	353,751	.06
2007	19,873	421,839	.05
2006	18,989	399,783	.05
2005	14,068	374,724	.04
2004	6114	356,487	.02
2	Total of line 1, column (d)		2 .22
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 .04
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5		4 250,391
5	Multiply line 4 by line 3		5 10,016
6	Enter 1% of net investment income (1% of Part I, line 27b)		6 10
7	Add lines 5 and 6		7 10,026
8	Enter qualifying distributions from Part XII, line 4 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 18.		8 27,400

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 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 or determination letter: _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	10	
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2		
3	Add lines 1 and 2	3	10	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	10	
6	Credits/Payments:			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	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		
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	10	
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 2010 estimated tax Refunded	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 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 foundation in connection with the activities.</i>		X
c Did the foundation 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 foundation. ► \$ <u>NONE</u> (2) On foundation managers. ► \$ <u>NONE</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ <u>NONE</u>		
2 Has the foundation 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 foundation 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 foundation 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 foundation 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) ► <u>VIRGINIA</u>		
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? <i>If "No," attach explanation</i>	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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? <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

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 page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► THE FOUNDATION Telephone no. ► 804-783-1488 Located at ► 117 SHOCKOE SLIP, RICHMOND, VA ZIP+4 ► 23219			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. ► <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . N/A . . . ► 15			

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.

	Yes	No
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? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(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) . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 20 of the instructions)? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here . . . ► <input type="checkbox"/>	1b	N/A
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 2009? . . .	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► 20 , 20 , 20 , 20		
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 page 20 of the instructions.) . . .	2b	X
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 , 20		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2009 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 2009.) . . .	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

Part VII-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:

- (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)? (see page 22 of the instructions) ☐ 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 22 of the instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No

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

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

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No**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 22 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
S.TUCKER GRIGG, JR. COTTAGE 264 W.27TH ST., SEA ISLAND, GA 31561	PRESIDENT NOMINAL	-0-	-0-	-0-
S.TUCKER GRIGG, III 94 GREENVIEW, ATLANTA, GA 30305	DIRECTOR NOMINAL	-0-	-0-	-0-
ELEANOR GRIGG BAIRD 425 KINGSWAY, AUGUSTA, GA 30904	DIRECTOR NOMINAL	-0-	-0-	-0-

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 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 ☐

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3** Five highest-paid independent contractors for professional services (see page 23 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 ▶

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 24 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 24 of the instructions.		
3	N/A	

Total. Add lines 1 through 3 ▶

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 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	1a	234,884
b	Average of monthly cash balances	1b	19,320
c	Fair market value of all other assets (see page 24 of the instructions)	1c	-0-
d	Total (add lines 1a, b, and c)	1d	254,204
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	254,204
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	3813
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	250,391
6	Minimum investment return. Enter 5% of line 5	6	12,520

Part XI Distributable Amount (see page 25 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	12,520
2a	Tax on investment income for 2009 from Part VI, line 5	2a	10
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	10
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	12,510
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	12,510
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	12,510

Part XII Qualifying Distributions (see page 25 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	27,410
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	27,410
5	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 page 26 of the instructions)	5	10
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	27,400

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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				12,510
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			16,310	
b Total for prior years: 20____, 20____, 20____		-0-		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	-0-			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 27,410				
a Applied to 2008, but not more than line 2a			16,310	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		-0-		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)	-0-			
d Applied to 2009 distributable amount				11,100
e Remaining amount distributed out of corpus	-0-			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	-0-			-0-
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	-0-			
b Prior years' undistributed income. Subtract line 4b from line 2b		-0-		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		-0-		
d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions		-0-		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions			-0-	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				1410
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	-0-			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	-0-			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	-0-			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) **N / A**

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
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 2/3 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 foundation had \$5,000 or more in assets at any time during the year—see page 28 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).)
S. TUCKER GRIGG, JR.

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.
NONE

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. (see page 28 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:

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

c Any submission deadlines:

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SEE SCHEDULE #4				
Total				3a 27,004
b <i>Approved for future payment</i> NONE				
Total				3b -0-

Part XVI-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 page 28 of the 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	4252	
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	(6851)	
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)				(2599)	
13	Total. Add line 12, columns (b), (d), and (e)				13	(2599)

(See worksheet in line 13 instructions on page 28 to verify calculations.)

Part XVI-B	Relationship of Activities to the Accomplishment of Exempt Purposes
------------	---

[illegible]

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

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

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

Signature of officer or trustee

5-14-10
Date

PRESIDENT
Title

Sign Here

**Paid
Preparer's
Use Only**Preparer's
signature 

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

Date _____

Check if self-employed ☐

Preparer's identifying
number (see **Signature** on
page 30 of the instructions)

EIN ►

Phone no.

IRENE AND TUCKER GRIGG FOUNDATION
54-1694119
2009

SCHEDULE #1

PART I
LINE 16A

MCGUIRE WOODS LLP
WORD & WORD PLC

COLUMN A	COLUMN B	COLUMN D
\$281		\$281
\$100		\$100
<hr/>		
\$381		\$381
<hr/>		

PART I
LINE 16C

MERRILL LYNCH INVESTMENT FEE
MERRILL LYNCH CONSULTS FEE

COLUMN A	COLUMN B	COLUMN D
\$150	\$150	
\$3,077	\$3,077	
<hr/>		
\$3,227	\$3,227	\$0
<hr/>		

PART I
LINE 18

EXCISE TAX BASED ON INVESTMENT INCOME
FOREIGN DIVIDEND TAX

COLUMN A	COLUMN B	COLUMN D
\$23		
\$9	\$9	
<hr/>		
\$32	\$9	\$0
<hr/>		

PART I
LINE 23

STATE CORPORATION COMMISSION FILING FEE

COLUMN A	COLUMN B	COLUMN D
\$25		\$25

SCHEDULE #2

PART II
LINE 10B

	NO OF SHARES	BOOK VALUE	FAIR MARKET VALUE
AGILENT TECHNOLOGIES	128	\$3,313	\$3,977
AMERIPRISE FINANCIAL	71	\$2,503	\$2,756
AMERICAN EXPRESS	351	\$14,682	\$14,222
BERKSHIRE HATHAWAY	5	\$14,325	\$16,430
BANK OF NEW YORK MELLON	278	\$9,272	\$7,776
BECTON DICKINSON	38	\$2,553	\$2,997
BLOCK H & R	94	\$1,747	\$2,126
BED BATH & BEYOND	105	\$3,643	\$4,054
COMCAST	173	\$3,405	\$2,770
CARDINAL HEALTH	68	\$2,186	\$2,193
CVS CAREMARK	247	\$7,487	\$7,956
CANADIAN NATURAL RESOURCES	120	\$8,463	\$8,634
COSTCO	253	\$10,724	\$14,970
CONOCO PHILLIPS	27	\$1,481	\$1,379
CAREFUSION	32	\$828	\$800
DIAGEO PLC SPSD ADR	63	\$3,127	\$4,373
DEVON ENERGY	161	\$5,721	\$11,834
DISNEY WALT	85	\$2,753	\$2,741
EXPRESS SCRIPTS	50	\$3,948	\$4,321
EOG RESOURCES	125	\$4,420	\$12,162
GRUPO TELEVISA SA ADR	103	\$1,441	\$2,138
GOOGLE	9	\$3,286	\$5,580
HARLEY DAVIDSON	145	\$6,513	\$3,654
HEWLETT PACKARD	105	\$3,974	\$5,409
IRON MOUNTAIN	231	\$4,571	\$5,258
JPMORGAN CHASE	164	\$5,879	\$6,834
JOHNSON AND JOHNSON	94	\$5,565	\$6,054
LOEWS	246	\$4,885	\$8,942
MOODY'S	86	\$2,943	\$2,305
MERCK	200	\$4,213	\$7,309
MICROSOFT	219	\$6,358	\$6,980
NEWSCORP	359	\$5,834	\$4,915
OCCIDENTAL PETE	204	\$8,789	\$16,596
PHILIP MORRIS INTL	60	\$1,556	\$2,891
PFIZER	164	\$2,151	\$2,983
PROCTER & GAMBLE	83	\$4,855	\$5,032
PROGRESSIVE	424	\$7,662	\$7,627
SEALED AIR	328	\$7,254	\$7,170
TRANSATLANTIC HLDGS	65	\$3,552	\$3,387
TEXAS INSTRUMENTS	184	\$4,294	\$4,795
TYCO INTL	46	\$1,796	\$1,641
TRANSOCEAN	36	\$2,961	\$2,981
VULCAN MATERIALS	40	\$2,051	\$2,106
WELLS FARGO	539	\$12,056	\$14,548
		\$221,020	\$265,606

2009

LINE 1

A	A	B	C	D	E	F	G	H
195 SHARES	JP MORGAN CHASE	P	83104	12309	4,599	0	7,646	(3,047)
92 SHARES	CITIGROUP	P	10308	31109	144	0	2,675	(2,531)
170 SHARE	PHILIP MORRIS INTL	P	83104	30209	5,597	0	4,407	1,190
15 SHARES	TYCO ELECTRONICS	P	83104	32309	161	0	548	(387)
31 SHARES	TYCO ELECTRONICS	P	61005	32309	333	0	1,087	(754)
15 SHARES	TYCO ELECTRONICS	P	120505	32309	161	0	509	(348)
15 SHARES	BLOCK H&R	P	92105	40109	266	0	358	(92)
60 SHARES	BLOCK H&R	P	10308	40109	1,065	0	1,115	(50)
20 SHARES	MICROSOFT	P	112801	61809	471	0	636	(165)
120 SHARES	COMCAST	P	83104	62609	1,669	0	2,205	(536)
145 SHARES	CONOCO PHILLIPS	P	83104	82109	6,376	0	5,316	1,060
30 SHARES	CONOCO PHILLIPS	P	91406	82109	1,319	0	1,767	(448)
100 SHARES	CISCO SYSTEMS	P	102208	81309	2,146	0	1,771	375
64 SHARES	GRUPO TELEvisa	P	20608	102309	1,305	0	1,364	(59)
36 SHARES	GRUPO TELEvisa	P	111908	102309	734	0	504	230
40 SHARES	MICROSOFT	P	112801	102109	1,063	0	1,272	(209)
5 SHARES	MICROSOFT	P	70803	102109	133	0	137	(4)
137 SHARES	SCHERING PLOUGH	P	111008	110509	1,438	0	870	568
65 SHARES	SCHERING PLOUGH	P	30309	110509	683	0	459	224
31 SHARE	AGILENT TECHNOLOGIES	P	11808	120709	927	0	1,043	(116)
107 SHARES	AMERICAN EXPRESS	P	83104	120709	4,263	0	4,646	(383)
37 SHARES	BANK NEWYORK MELLON	P	30107	120709	998	0	1,604	(606)
46 SHARES	BLOCK H&R	P	10308	120709	937	0	855	82
9 SHARES	BED BATH & BEYOND	P	20108	120709	352	0	289	63
183 SHARES	COMCAST	P	83104	120709	2,900	0	3,362	(462)
12 SHARES	CVS CAREMARK	P	120505	120709	371	0	369	2
20 SHARES	COSTCO WHOLESALE	P	83104	120709	1,190	0	838	352
28 SHARES	CONOCO PHILLIPS	P	91406	120709	1,429	0	1,649	(220)
17 SHARES	DIAGEO PLC	P	83104	120709	1,184	0	844	340
16 SHARES	EOG RESOURCES	P	83104	120709	1,406	0	456	950
11 SHARES	GRUPO TELEvisa	P	111908	120709	235	0	154	81
34 SHARES	JP MORGAN CHASE	P	83104	120709	1,415	0	1,333	82
6 SHARES	JP MORGAN CHASE	P	20305	120709	250	0	225	25
5 SHARES	JOHNSON AND JOHNSON	P	102108	120709	322	0	322	0
9 SHARES	MOODY'S	P	83104	120709	227	0	308	(81)
17 SHARES	MICROSOFT	P	70803	120709	508	0	465	43
10 SHARES	MICROSOFT	P	71503	120709	299	0	274	25
52 SHARES	NEWS CORP	P	41306	120709	635	0	877	(242)
15 SHARES	PHILIP MORRIS INTL	P	83104	120709	751	0	389	362
8 SHARES	PROCTER & GAMBLE	P	50806	120709	500	0	448	52
12 SHARES	PROGRESSIVE	P	10308	120709	202	0	223	(21)
20 SHARES	SEALED AIR	P	10308	120709	454	0	458	(4)
9 SHARES	TYCO ELECTRONICS	P	10308	120709	322	0	351	(29)
75 SHARES	TEXAS INSTRUMENTS	P	52308	120709	2,000	0	2,374	(374)
80 SHARES	UNITED HEALTH GROUP	P	102006	121609	2,554	0	4,079	(1,525)
10 SHARES	UNITED HEALTH GROUP	P	10308	121609	319	0	568	(249)
7 SHARES	UNITED HEALTH GROUP	P	120709	121609	223	0	198	25
26 SHARES	WELLS FARGO	P	83104	120709	695	0	761	(66)
CASH IN LIEU	CAREFUSION	P	83104	100109	9	0	0	9
CASH IN LIEU	MERCK	P	111008	111909	17	0	0	17
					57,557	0	64,408	(6,851)

IRENE AND TUCKER GRIGG FOUNDATION
54-1694119
2009

SCHEDULE #4

PART XV
LINE 3A

COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
CYSTIC FIBROSIS FOUNDATION 2720 ENTERPRISE PARKWAY, SUITE 107 RICHMOND, VA 23294-6340	N/A	PUBLIC	PROVIDES ONGOING RESEARCH IN FINDING A CURE FOR CF	250
CHRISTIAN CHILDREN'S FUND 2821 EMERYWOOD PARKWAY RICHMOND, VA 23261	N/A	PUBLIC	SPONSOR TO UNDERPRIVILEGED CHILDREN	504
ST SIMONS PRESBYTERIAN CHURCH 205 KING'S WAY ST SIMONS ISLAND, GA 31522	N/A	PUBLIC	TO BENEFIT THE PLEDGE TO CHURCH SERVICES	1,250
ST CHRISTOPHER'S SCHOOL FOUNDATION 711 ST CHRISTOPHER'S ROAD RICHMOND, VA 23226	N/A	PRIVATE	SUPPORT FOR QUALITY EDUCATION	25,000
				----- 27,004 =====