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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

OMB No 1545-0052

2012

Open to Public Inspection

For calendar year 2012, or tax year beginning 01-01-2012 , and ending 12-31-2012

Name of foundation CAL TURNER FAMILY FOUNDATION INC		A Employer identification number 26-2886973	
Number and street (or P O box number if mail is not delivered to street address) 138 SECOND AVENUE NORTH		B Telephone number (see instructions) (615) 846-2048	
City or town, state, and ZIP code NASHVILLE, TN 37201		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 47,444,683		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
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 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)	2,316,550			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,154,775	1,096,186		
	4 Dividends and interest from securities.	534,789	534,789		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	2,999,753			
	b Gross sales price for all assets on line 6a _____ 3,306,284				
	7 Capital gain net income (from Part IV, line 2)		2,999,753		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	-408,227	-367,248		
	12 Total. Add lines 1 through 11	6,597,640	4,263,480		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	1,963	687		1,276
	b Accounting fees (attach schedule)	127,194	44,518		82,676
	c Other professional fees (attach schedule)				
	17 Interest	6,630	6,630		
	18 Taxes (attach schedule) (see instructions)	3,031	19,189		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	14			14
	22 Printing and publications				
	23 Other expenses (attach schedule)	521,283	509,894		10,530
	24 Total operating and administrative expenses. Add lines 13 through 23	660,115	580,918		94,496
	25 Contributions, gifts, grants paid	4,661,004			4,661,004
	26 Total expenses and disbursements. Add lines 24 and 25	5,321,119	580,918		4,755,500
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	1,276,521			
	b Net investment income (if negative, enter -0-)		3,682,562		
	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			
	2	Savings and temporary cash investments	3,716,907	1,373,777	1,373,777
	3	Accounts receivable  51,765			
		Less allowance for doubtful accounts  _____	584	51,765	51,765
	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)	3,854,821 	4,450,620	5,801,883
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis  _____			
		Less accumulated depreciation (attach schedule)  _____			
Liabilities	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	42,957,318 	44,861,482	40,217,258
	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)	50,529,630	50,737,644	47,444,683
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe  _____)			
Net Assets or Fund Balances	23	Total liabilities (add lines 17 through 22)		0	
		Foundations that follow SFAS 117, check here  ☐			
		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  ☒			
		and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	50,529,630	50,737,644	
	30	Total net assets or fund balances (see page 17 of the instructions)	50,529,630	50,737,644	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	50,529,630	50,737,644	

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	50,529,630
2	Enter amount from Part I, line 27a	2	1,276,521
3	Other increases not included in line 2 (itemize)  _____	3	
4	Add lines 1, 2, and 3	4	51,806,151
5	Decreases not included in line 2 (itemize)  _____	5	1,068,507
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	50,737,644

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 Additional Data Table			
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	See Additional Data Table		
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) 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	See Additional Data Table		
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	2,999,753
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 page 18 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))
2011	6,164,730	47,029,232	0 13108
2010	3,889,102	45,687,661	0 08512
2009	2,676,384	39,021,022	0 06859
2008	2,203,852	55,114,926	0 03999
2007	4,223,275	60,298,554	0 07004

2	Total of line 1, column (d).	2	0 39482
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 07896
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	44,438,993
5	Multiply line 4 by line 3.	5	3,509,081
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	36,826
7	Add lines 5 and 6.	7	3,545,907
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	8	4,755,500

Part VIExcise 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 ☐ 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 ☒ and enter 1% of Part I, line 27b		1	36,826
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	36,826
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	36,826
6		Credits/Payments			
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	73,000	
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	73,000
8		Enter any penalty for underpayment of estimated tax Check here ☐ 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		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	36,174
11		Enter the amount of line 10 to be Credited to 2013 estimated tax ☐ 36,174	Refunded ☐	11	

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
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)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	• By language in the governing instrument, or			
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ TN _____			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 	10	Yes	

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).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶N/A				
14	The books are in care of ▶JUDY MILLER Telephone no ▶(615) 846-2048 Located at ▶138 SECOND AVENUE NORTH SUITE 200 NASHVILLE TN ZIP +4 ▶37201			
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 2012, 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?	16		No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 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.			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? ☐ 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 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). ☐ 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 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		No
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 2012?.	1c		No
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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?. ☐ Yes ☒ 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 instructions).	2b		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____, 20____			
3a	Did the foundation 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 2012 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.</i>).	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2012?	4b		No

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))?

YesNo

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

YesNo

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

YesNo

(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 instructions).

YesNo

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

YesNo

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

No

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?

YesNo

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?

YesNo

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

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?

YesNo

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

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 instructions).

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

2

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

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

Total number of other employees paid over \$50,000.

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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 instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
THE FAMILY OFFICE	INVEST /PROF FEES	295,306
138 SECOND AVE N STE 200		
NASHVILLE,TN 37201		
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	
2	
3	
4	

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
1	
2	
All other program-related investments. See page 24 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 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	41,120,014
b	Average of monthly cash balances.	1b	3,995,715
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	45,115,729
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	
3	Subtract line 2 from line 1d.	3	45,115,729
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	676,736
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	44,438,993
6	Minimum investment return. Enter 5% of line 5.	6	2,221,950

Part XI

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

1	Minimum investment return from Part X, line 6.	1	2,221,950
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	36,826
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	36,826
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	2,185,124
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	2,185,124
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	2,185,124

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	4,755,500
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	4,755,500
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 instructions).	5	36,826
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	4,718,674
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 2011	(c) 2011	(d) 2012
1		Distributable amount for 2012 from Part XI, line 7			
2		Undistributed income, if any, as of the end of 2012			
a		Enter amount for 2011 only.			
b		Total for prior years 20____, 20____, 20____			
3		Excess distributions carryover, if any, to 2012			
a		From 2007.			
b		From 2008.			
c		From 2009. 94,015			
d		From 2010. 1,678,975			
e		From 2011. 3,901,850			
f		Total of lines 3a through e. 5,674,840			
4		Qualifying distributions for 2012 from Part XII, line 4 \$ 4,755,500			
a		Applied to 2011, but not more than line 2a			
b		Applied to undistributed income of prior years (Election required—see instructions).			
c		Treated as distributions out of corpus (Election required—see instructions). 0			
d		Applied to 2012 distributable amount. 2,185,124			
e		Remaining amount distributed out of corpus 2,570,376			
5		Excess distributions carryover applied to 2012 (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 8,245,216			
b		Prior years' undistributed income Subtract line 4b from line 2b.			
c		Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			
d		Subtract line 6c from line 6b Taxable amount—see instructions.			
e		Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions.			
f		Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013. 0			
7		Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).			
8		Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions).			
9		Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a. 8,245,216			
10		Analysis of line 9			
a		Excess from 2008.			
b		Excess from 2009. 94,015			
c		Excess from 2010. 1,678,975			
d		Excess from 2011. 3,901,850			
e		Excess from 2012. 2,570,376			

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 2012, 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)

☐ 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) 2012	(b) 2011	(c) 2010	(d) 2009	
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 organization 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))

H CALLISTER TURNER 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

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 instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number or e-mail of the person to whom applications should be addressed

CABOT PYLE
138 SECOND AVENUE NORTH
NASHVILLE, TN 37201
(615) 846-2053

b

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

APPLICATION FORM PROVIDED BY THE FOUNDATION INCLUDE DOCUMENTATION OF TAX EXEMPT STATUS, LIST OF OFFICERS & DIRECTORS, MOST RECENT AUDITED FINANCIAL STATEMENT, INTERNAL FINANCIAL STATEMENTS & OPERATING BUDGET, PROJECTED BUDGET

c

Any submission deadlines

NONE

d

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

NO GRANTS FOR INDIVIDUALS, LOANS, TRAVEL OR SEMINARS, GOVERNMENT AGENCIES, POLITICAL PURPOSES, DINNER EVENTS, OTHER PRIVATE FOUNDATIONS, TELETHONS

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)				
a <i>Paid during the year</i> SEE ATTACHMENT A VARIOUS VARIOUS,TN 37201	NONE	PUBLIC	FOR SUPPORT OF ONGOING CHARITABLE ACTIVITIES	4,661,004
Total  3a				4,661,004
b <i>Approved for future payment</i> SEE ATTACHMENT B VARIOUS VARIOUS,TN 37201	NONE	PUBLIC	FOR SUPPORT OF ONGOING CHARITABLE ACTIVITIES	7,054,800
Total  3b				7,054,800

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments.					
3	Interest on savings and temporary cash investments			14	1,154,775	
4	Dividends and interest from securities.			14	534,789	
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	2,999,753	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory.					
11	Other revenue a TD REAL ESTATE LP			14	-27,774	
b	DG STORE III, LP	531120	198	14	-417,323	
c	BEDELIA STREET K-1			14	1	
d	7/6 INVESTMENT K-1	211110	-41,177	14	77,848	
e	_____					
12	Subtotal Add columns (b), (d), and (e).		-40,979		4,322,069	
13	Total. Add line 12, columns (b), (d), and (e).			13		4,281,090

[illegible]

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?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
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

**Sign
Here**

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

*****	2013-11-07	*****	May the IRS discuss this return with the preparer shown below (see Instr.)? ☒ Yes ☐ No
Signature of officer or trustee	Date	Title	

May the IRS discuss this return with the preparer shown below (see instr. 7)? ☒ **Yes** ☐ **No**

**Paid
Preparer
Use
Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☒	PTIN P00666397
	Stephen T Dolan	Stephen T Dolan			
	Firm's name ☐	Frasier Dean & Howard PLLC		Firm's EIN ☐	
		3310 West End Avenue Ste 550			
	Firm's address ☐	Nashville, TN 37203		Phone no (615) 383-6592	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
1000 PROSHARES TR ULTRA	P	2010-12-07	2012-11-02
3096 JPMORGAN CHASE CAP	P	2008-10-31	2012-10-31
1904 JPMORGAN CHASE CAP	P	2008-10-31	2012-10-25
2000 WACHOVIA CAP TR	P	2011-02-11	2012-06-15
FROM K-1 TURSON, LP	P	2000-01-01	2012-12-31
FROM K-1 TURSON, LP	P	2012-01-01	2012-12-31
FROM K-1 HCTS CASH MANAGEMENT P'SHIP	P	2000-01-01	2012-12-31
FROM K-1 HCTS CASH MANAGEMENT P'SHIP	P	2012-01-01	2012-12-31
FROM K-1 7/6 INVESTMENT P'SHIP	P	2000-01-01	2012-12-31
FROM K-1 7/6 INVESTMENT P'SHIP	P	2012-01-01	2012-12-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
63,865		148,766	-84,901
78,785		64,834	13,951
48,449		39,872	8,577
50,000		49,888	112
1,722,327			1,722,327
340,169			340,169
		1,990	-1,990
		1,181	-1,181
970,173			970,173
32,516			32,516

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-84,901
			13,951
			8,577
			112
			1,722,327
			340,169
			-1,990
			-1,181
			970,173
			32,516

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
HAL CATO	Director 1 00	0		
138 SECOND AVENUE NORTH NASHVILLE,TN 37021				
CABOT PYLE	ASSISTANT SECT 1 00	0		
138 SECOND AVENUE NORTH NASHVILLE,TN 37201				
MARK EZELL	Director 1 00	0		
138 SECOND AVENUE NORTH NASHVILLE,TN 37201				
JENNIFER L TURNER	Director 1 00	0		
138 SECOND AVENUE NORTH NASHVILLE,TN 37201				
HURLEY C TURNER III	SECRETARY/TREAS 1 00	0		
138 SECOND AVENUE NORTH NASHVILLE,TN 37201				
MARGARET B TURNER	Vice President 1 00	0		
138 SECOND AVENUE NORTH NASHVILLE,TN 37201				
H CALLISTER TURNER JR	President 1 00	0		
138 SECOND AVENUE NORTH NASHVILLE,TN 37201				

Schedule B

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2012

Name of the organization CAL TURNER FAMILY FOUNDATION INC	Employer identification number 26-2886973
---	---

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

Name of organization CAL TURNER FAMILY FOUNDATION INC	Employer identification number 26-2886973
---	---

Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space is needed		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CAL TURNER JR 138 SECOND AVENUE NORTH NASHVILLE, TN 37201	\$ 2,316,550	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

[illegible]

Name of organization CAL TURNER FAMILY FOUNDATION INC	Employer identification number 26-2886973
---	---

Part III	Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of <i>exclusively</i> religious, charitable, etc , contributions of \$1,000 or less for the year (Enter this information once See instructions) ▶ \$ Use duplicate copies of Part III if additional space is needed
-----------------	---

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

TY 2012 Accounting Fees Schedule**Name:** CAL TURNER FAMILY FOUNDATION INC**EIN:** 26-2886973**Software ID:** 12000229**Software Version:** 2012v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	127,194	44,518	0	82,676

TY 2012 Contractor Compensation Explanation

Name: CAL TURNER FAMILY FOUNDATION INC

EIN: 26-2886973

Software ID: 12000229

Software Version: 2012v2.0

Contractor	Explanation
THE FAMILY OFFICE	

**TY 2012 Investments Corporate
Stock Schedule****Name:** CAL TURNER FAMILY FOUNDATION INC**EIN:** 26-2886973**Software ID:** 12000229**Software Version:** 2012v2.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
HCA HOLDINGS INC	623,333	1,661,009
AINTREE CAPITAL	3,827,287	4,140,874

TY 2012 Investments - Other Schedule**Name:** CAL TURNER FAMILY FOUNDATION INC**EIN:** 26-2886973**Software ID:** 12000229**Software Version:** 2012v2.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
TD REAL ESTATE LP	AT COST	1,302,898	1,013,118
DG STORE III, LP	AT COST	466,537	1,020,365
COVENANT APARTMENT FUND VI, LP	AT COST	339,485	359,780
HCTS CASH MANAGEMENT PARTNERSHIP	AT COST	2,065,987	1,669,871
7/6 INVESTMENT P'SHIP	AT COST	10,437,500	8,635,131
TURSON, LP	AT COST	26,206,915	24,902,801
BEDELIA STREET PARTNERS, LP	AT COST	4,042,160	2,616,192

TY 2012 Legal Fees Schedule**Name:** CAL TURNER FAMILY FOUNDATION INC**EIN:** 26-2886973**Software ID:** 12000229**Software Version:** 2012v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	1,963	687	0	1,276

TY 2012 Mortgages and Notes Payable Schedule**Name:** CAL TURNER FAMILY FOUNDATION INC**EIN:** 26-2886973**Software ID:** 12000229**Software Version:** 2012v2.0**Total Mortgage Amount:**

Item No.	1
Lender's Name	BANK OF AMERICA
Lender's Title	
Relationship to Insider	THIRD PARTY LENDER
Original Amount of Loan	3000000
Balance Due	
Date of Note	2005-12
Maturity Date	2007-03
Repayment Terms	LUMP SUM IN ONE YEAR
Interest Rate	
Security Provided by Borrower	225,000 SHS DOLLAR GENERAL STK
Purpose of Loan	SATISFY CHARITABLE COMMITMENT
Description of Lender Consideration	CASH
Consideration FMV	

TY 2012 Other Decreases Schedule

Name: CAL TURNER FAMILY FOUNDATION INC

EIN: 26-2886973

Software ID: 12000229

Software Version: 2012v2.0

Description	Amount
VALUE OF STOCK GIFTED IN EXCESS OF DONOR'S BASIS	1,068,507

TY 2012 Other Expenses Schedule

Name: CAL TURNER FAMILY FOUNDATION INC

EIN: 26-2886973

Software ID: 12000229

Software Version: 2012v2.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SUBSCRIPTIONS	16			16
SEMINARS, BOOKS, EDUCATION	3,233	1,132		2,101
OFFICE SUPPLIES	1,330			1,330
MISCELLANEOUS	84	27		57
K-1 TURSON, LP	121,930	121,922		
K-1 TD REAL ESTATE LP	415			
K-1 HCTS CASH MANAGEMENT P'SHIP	5,629	5,484		
K-1 BEDELIA STREET	22,135	22,135		
K-1 7/6 INVESTMENT P'SHIP- CHARITABLE	31			31
K-1 7/6 INVESTMENT PARTNERSHIP	154,076	153,785		
FOOD & BEVERAGE	665			665
DUES & MEMBERSHIPS	6,330			6,330
BROKERAGE FEES	205,409	205,409		

TY 2012 Other Income Schedule**Name:** CAL TURNER FAMILY FOUNDATION INC**EIN:** 26-2886973**Software ID:** 12000229**Software Version:** 2012v2.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
TD REAL ESTATE LP	-27,774	-27,774	
DG STORE III, LP	-417,125	-417,323	
BEDELIA STREET K-1	1	1	
7/6 INVESTMENT K-1	36,671	77,848	

TY 2012 Substantial Contributors Schedule

Name: CAL TURNER FAMILY FOUNDATION INC

EIN: 26-2886973

Software ID: 12000229

Software Version: 2012v2.0

Name	Address
CAL TURNER JR	138 SECOND AVENUE NORTH NASHVILLE, TN 37201

TY 2012 Taxes Schedule**Name:** CAL TURNER FAMILY FOUNDATION INC**EIN:** 26-2886973**Software ID:** 12000229**Software Version:** 2012v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE INCOME TAX	2,207	2,207		
FOREIGN TAX PAID	16,982	16,982		
FEDERAL INCOME TAX	16,158			

Attachment A

Cal Turner Family Foundation, Inc. 26-2886973 Form 990-PF, Part XV, Line 3A Grants and Contributions Paid During the Year 2012

Recipient Name and Address	Donor Relationship	Foundation Status	Purpose of Grant or Contribution	Amount
23rd Psalm Ministry 2203 Buena Vista Pike Nashville, TN 37218	None	Church	Program support for adult children	\$25,000
Apes Garden 618 Church Street Suite 220 Nashville, TN 37203	None	Public	The Club at Apes Garden - capital campaign for new day care and residential facilities for persons with Alzheimer's	\$250,000
Adventure Science Center 800 Fort Nelson Boulevard Nashville, TN 37204	None	Public	Sodekum Planetarium	\$100,000
American Heart Association 1818 Patterson Street Nashville, TN 37203	None	Public	AHA Executive Breakfast	\$5,000
American Red Cross - Nashville Area Chapter 2201 Charlotte Avenue Nashville, TN 37203	None	Public	Hurricane Sandy relief efforts	\$25,000
Andrew Jackson Police Youth Camp 120 Welshway Nashville, TN 37211	None	Public	Youth camp support	\$1,000
ART of Williamson County 129 W. Lowkey Street Franklin, TN 37064-2567	None	Public	Eddee Inc.	\$25,000
Backfield in Motion 926 Woodland Street Nashville, TN 37206	None	Public	Education-related programming for inner-city youth	\$25,000
Belmont University 1906 Belmont Boulevard Nashville, TN 37212-3757	None	School	School of Nursing support	\$5,000
Bethlehem Centers of Nashville 1417 Charlotte Avenue Nashville, TN 37203-3414	None	Public	Operations Support	\$1,740
Brentwood United Methodist Church 209 Franklin Road Brentwood, TN 37027	None	Church	Serene Hill campus	\$40,000
BRIDGES of Williamson County P.O. Box 1892 Franklin, TN 37065	None	Public	Capital and program support	\$64,800

Campus Crusade for Christ 100 Lake Hill Drive #2400 Orlando, FL 32832	None	Public	Cru Nashville - Vanderbilt Campus	\$40,000
Campus for Human Development P.O. Box 25309 Nashville, TN 37202	None	Public	\$1,000,000 to construct a learning center and \$250,000 in program funding for education/job readiness	\$250,000
Center For Living and Learning, Inc. P.O. Box 50277 Nashville, TN 37205	None	Public	Capital support	\$24,000
Center for Youth Ministry Training 309 Franklin Road Brentwood, TN 37027	None	Public	Recruitment of Paid Level instructor for the Center for Youth Ministry	\$10,000
Centerstone 1101 6th Avenue North Nashville, TN 37208	None	Public	Capital support of new behavioral health clinic at the DeDe Wallace Campus on White Avenue	\$100,000
Charley Foundation PO Box 120126 Nashville, TN 37212	None	Public	Ringside vs Fight for Kids	\$3,000
Community Care Fellowship PO Box 60068 Nashville, TN 37206	None	Church	General operating support	\$10,000
Community Outreach Ministries P.O. Box 1529 Franklin, TN 37065-1529	None	Public	Support for work with Williamson County Sheriff's Office and County Drug Court	\$20,000
Conexion Americas 800 18th Avenue South #3 Nashville, TN 37203	None	Public	Capital campaign for new immigrant center	\$50,000
Council on Aging of Greater Nashville 95 White Bridge Road #111 Nashville, TN 37205	None	Public	Program support	\$5,000
Crescent Project PO Box 50986 Indianapolis, IN 46250	None	Public	Crescent Project Tennessee	\$15,000
Cumberland Heights Foundation P.O. Box 90727 Nashville, TN 37209	None	Public	Complete renovations of men's cabin named in honor of Michael Pontes	\$30,000
Discovery Place 1635 Spencer Mill Road Rumr, TN 37029	None	Public	Scholarships	\$5,000
Easter Seals Tennessee 3011 Armory Drive Nashville, TN 37204	None	Public	Operations support	\$1,740
Easter Seals Tennessee	None	Public	Handicap accessible doors for	\$7,000

3911 Armory Drive Nashville, TN 37204			campers at Camp W	
Episcopal Communities & Services 1111 S. Arawaho Parkway Pasadena, CA 91105	None	Church	Operations support	\$5,000
Ethos Church 51 Music Square West Nashville, TN 37203	None	Church	Operations support	\$5,000
Faith Family Medical Clinic 326 21st Avenue North Nashville, TN 37203	None	Public	Operations support	\$5,000
Faith Family Medical Clinic 326 21st Avenue North Nashville, TN 37203	None	Public	Support for patients on a sliding scale	\$50,000
Family Altair Ministries PO Box 60448 Nashville, TN 37206	None	Public	Support for Learning Zone - an after-school program for at-risk youth	\$20,000
Fannie Battle Day Home for Children 108 Chapel Avenue Nashville, TN 37206	None	Public	Operations support	\$1,740
Fannie Battle Day Home for Children 108 Chapel Avenue Nashville, TN 37206	None	Public	Tuition support for childcare services	\$20,000
Fellowship of Christian Athletics 2603 Elm Hill Pike # C Nashville, TN 37214	None	Public	Programming support	\$5,000
Fifty Forward 171 Rains Avenue Nashville, TN 37203	None	Public	Continued support of FLIP - Friends Learning in Pairs (an intergenerational tutoring program)	\$10,000
First Steps, Inc. 1900 Graybar Lane Nashville, TN 37215	None	Public	Operations support	\$1,740
First Steps, Inc. 1900 Graybar Lane Nashville, TN 37215	None	Public	Capital campaign for the purchase of the McWhorter Childcare Center on Woodmont Blvd.	\$38,400
Franklin Road Academy 4700 Franklin Road Nashville, TN 37220	None	School	Program support	\$70,440
Friendship House 202 23rd Avenue North Nashville, TN 37203	None	Public	Operations support	\$25,000
Girls on the Run Nashville PO Box 50175 Nashville, TN 37205-0174	None	Public	Program support	\$13,600

Hands on Nashville 209 10th Avenue South Nashville, TN 37203	None	Public	Operations support	\$1,740
Harvest Hands Community Development Corp 424 Humphreys Street Nashville, TN 37203	None	Public	Program support	\$25,000
Heritage Foundation of Franklin and Williamson County PO Box 723 Franklin, TN 37064	None	Public	Capital campaign	\$200,000
Heritage Foundation of Franklin and Williamson County PO Box 723 Franklin, TN 37064	None	Public	Challenge grant to purchase Cotton Gin Park property	\$50,000
Hope Clinic For Women 1810 Hayes Street Nashville, TN 37203	None	Public	One-time gift for debt reduction	\$25,000
Hope Clinic For Women 1810 Hayes Street Nashville, TN 37203	None	Public	Program support for Prevention Services	\$10,000
In Full Motion, Inc PO Box 70270 Nashville, TN 37207	None	Public	Prep program assisting 300 at-risk youth with ACT test prep	\$10,000
Jovenes en Camino PO Box 2883 Brentwood, TN 37024	None	Public	Operations support	\$5,000
Junior Achievement of Middle Tennessee 120 Powell Place Nashville, TN 37204	None	Public	Program support	\$10,000
Lewis County Imagination Library 206 South Court Street Hohenwald, TN 38462	None	Governmental Entity	Programming support to provide and appropriate books monthly to preschool children county-wide	\$4,500
Little Kids Rock 632 Pompton Ave Suite 2 Cedar Grove, NJ 07009	None	Public	Program support	\$5,000
LSI 325, Inc 5224 Banbury Crossing Brentwood, TN 37027	None	Public	Support for event to bring LSI 325 ship to Nashville for exhibit	\$5,000
Magdalene c/o St. Augustine's Chapel P.O. Box 6330, Station B Nashville, TN 37235	None	Public	2012 IRA Turner Fellow Alex Brito at Thistle Farms	\$1,740

Magdalene P.O. Box 6330 Station B Nashville, TN 37235	None	Public	Program support	\$40,000
Martha O'Bryan Center 711 South 7th Street Nashville, TN 37206	None	Public	\$60,480 for two years in support of adding literacy, math and science tutors to HHRNA's out-of-school program	\$60,000
Martha O'Bryan Center 711 South 7th Street Nashville, TN 37206	None	Public	2017 ERA Tutor Fellow - Leticia Foster	\$1,740
Martha O'Bryan Center 711 South 7th Street Nashville, TN 37206	None	Public	Operations support	\$5,000
McNelly Center for Children 700 Mendham Street Nashville, TN 37207	None	Public	Operational support	\$25,000
Meckarts Medical College 1005 Dr. D.B. Todd Jr. Blvd Nashville, TN 37208	None	School	Capital campaign for new campus center	\$600,000
Mersey Children's Clinic 1113 Murfreesboro Road Franklin, TN 37064-1312	None	Public	Operations support	\$50,000
Methodist Healthcare Foundation PO Box 42048 Memphis, TN 38174-2048	None	Public	Support of 20 pastors for CCNet program	\$50,000
Middle Tennessee Chapter National Outback Foundation	None	Public	Program support	\$10,000
Monroe Harding, Inc. 1170 Glendale Lane Nashville, TN 37204	None	Public	Capital support for expanded facilities on their main campus	\$75,000
Nashville Ballet 3630 Redmont St Nashville, TN 37206	None	Public	2012 Ballet Ball	\$5,000
Nashville CARM's 633 Thompson Lane Nashville, TN 37204	None	Public	Dining One for Life event	\$5,000
Nashville Humane Association 215 Okola Avenue Nashville, TN 37209	None	Public	Cause for Paws support	\$5,000
Nashville Preparatory Charter School 330 10th Avenue North Nashville, TN 37203	None	School	Operations support	\$5,000
Nashville RBI, Inc. 3700 Ashland City Hwy Nashville, TN 37218	None	Public	Program support	\$18,750

Nashville Symphony One Symphony Place Nashville, TN 37201	None	Public	Endowment for operations	\$150,000
Nelson Andrew Leadership Center 3088 South Springs Rd Antioch, TN 37013	None	Public	Operations support	\$60,000
New Hope Academy 1820 Downs Blvd Franklin, TN 37064	None	Public	Scholarship for one student	\$9,900
Oasis Center 1704 Charlotte Pike Nashville, TN 37212	None	Public	Crisis Services support	\$35,000
Oasis Center 1704 Charlotte Pike Nashville, TN 37212	None	Public	Operations support	\$3,000
Our Kids Center, Inc. 1804 Hayes Street Nashville, TN 37203	None	Public	Operations support	\$5,000
Pastoral Counseling Center of Tennessee, Inc. 100 Vine Ct Nashville, TN 37203	None	Public	Program support	\$12,500
Positive Impact, Inc. P.O. Box 7410 Brentwood, TN 37024	None	Public	Operating support	\$35,000
Preston Taylor Ministries P.O. Box 90442 Nashville, TN 37209	None	Public	Operations support	\$1,740
Preston Taylor Ministries P.O. Box 90442 Nashville, TN 37209	None	Public	Support for Self - Servant and Leadership Training program	\$10,000
Princeton Theological Seminary Post Office Box 821 Princeton, NJ 08542-0821	None	School	Funding to support two Timothy Scholars at the Princeton Theological Seminary	\$60,000
Rocketown of Middle Tennessee P.O. Box 331129 Nashville, TN 37203	None	Public	Operations support	\$5,000
Rocketown of Middle Tennessee P.O. Box 331129 Nashville, TN 37203	None	Public	Program and outreach support	\$25,000
Rooflop Foundation 3511 Galatin Road Suite 202 Nashville, TN 37216	None	Public	Program support for rent and utility assistance initiative	\$10,000

Saddle Up 1519 Old Hillsboro Rd Franklin, TN 37069	None	Public	Scholarship support for riders	\$8,774
Safe Haven Family Shelter 1234 Third Avenue S Nashville, TN 37210	None	Public	Capital campaign to renovate and expand shelter for homeless families	\$100,000
Salvation Army - Tennessee 631 Dickerson Rd Nashville, TN 37207	None	Church	Operations support	\$1,740
St. Augustine's Chapel 200 24th Avenue S Nashville, TN 37212	None	Church	Mission trip to Ecuador	\$2,000
St. Luke's Community House 5601 New York Avenue Nashville, TN 37209	None	Public	Operations support	\$1,740
St. Luke's Community House 5601 New York Avenue Nashville, TN 37209	None	Public	Program and operations support	\$25,000
STARs Nashville 1704 Charlotte Pike Nashville, TN 37203	None	Public	New program partnership with Alcohol and Drug Council of Middle Tennessee	\$10,000
Tennessee Justice for Our Neighbors 7007 Acklen Avenue Nashville, TN 37212	None	Public	Program support	\$5,000
Tennessee Repertory Theatre 161 Rams Avenue Nashville, TN 37203	None	Public	Program support	\$3,000
The Next Door PO Box 23346 Nashville, TN 37202	None	Public	Program support for women in substance abuse recovery	\$25,000
United Way of Metropolitan Nashville 250 Venture Circle Nashville, TN 37228	None	Public	Read to Succeed program of the United Way	\$80,000
Urban Housing Solutions 411 Murfreesboro Rd Nashville, TN 37210	None	Public	Establish Housing Trust Fund	\$10,000
Vanderbilt University Divinity School 411 21st Avenue South Nashville, TN 37240	None	School	Bishop Joe Pennel's position at Vanderbilt Divinity School	\$25,000
Vanderbilt University Divinity School 411 21st Avenue South Nashville, TN 37240	None	School	Turner Leadership Scholars Program	\$485,000
Vanderbilt University Divinity School	None	School	United Methodist Programs	\$35,000

441 21st Avenue South
Nashville, TN 37240

Vanderbilt University Owen
Graduate School of Management
2301 Vanderbilt Place
Nashville, TN 37235-7753

W. O. Smith Music School
1125 8th Avenue South
Nashville, TN 37212-1348

Walden's Puddle
PO Box 611
Joelton, TN 37080

Wayne Reed Christian Childcare
Center
11-B Lindsay Ave
Nashville, TN 37210

Williamson County CASA Inc
101 Forrest Crossing Blvd
Franklin, TN 37064

YMCA of Middle Tennessee
1000 Church Street
Nashville, TN 37203

YMCA of Middle Tennessee
1000 Church Street
Nashville, TN 37203

YMCA of Middle Tennessee
1000 Church Street
Nashville, TN 37203

YMCA of Middle Tennessee
1000 Church Street
Nashville, TN 37203

Young Life Nashville
P.O. Box 120681
Nashville, TN 37212

Young Life Nashville
P.O. Box 120681
Nashville, TN 37212

None

School

Project Pyramid

\$60,000

None

Public

2012 Birdhouse Hump

\$5,000

None

Public

Operating support

\$12,000

None

Public

Capital improvements

\$25,000

None

Public

Operations support

\$25,000

None

Public

Operations support

\$1,710

None

Public

Nelson Andrews Leadership Center

\$250,000

None

Public

Presidents Benevolence Fund

\$7,500

None

Public

YC AP funding

\$175,000

None

Public

Programming support to help start
Urban Young Life in inner city
schools

\$5,000

None

Public

Wyldlife director position

\$35,000

\$1,061,004.00

Cal Turner Family Foundation, Inc. 26-2886973
Form 990-PF, Part XV, Line 3B
Grants and Contributions Approved for Future Payment as of 12.31.2012

Recipient Name and Address	Donor Relationship	Foundation Status	Purpose of Grant or Contribution	Amount
Abe's Garden 618 Church Street Suite 220 Nashville, TN 37219	None	Public	The Club at Abe's Garden - capital campaign for new day care and residential facilities for persons with Alzheimers	\$500,000
Brentwood United Methodist Church 309 Franklin Road Brentwood, TN 37027	None	Church	Spring Hill campus	\$30,000
Campus for Human Development P.O. Box 25300 Nashville, TN 37202	None	Public	\$1,000,000 to construct a learning center and \$250,000 in program funding for education/job readiness	\$250,000
Center for Youth Ministry Training 309 Franklin Road Brentwood, TN 37027	None	Public	Recruitment of PH.D. level instructor for the Center for Youth Ministry	\$80,000
Center for Youth Ministry Training 309 Franklin Road Brentwood, TN 37027	None	Public	Support for Academic Director and Professor of Youth Ministry at the Center for Youth Ministry	\$135,000
Conexion Americas 800 18th Avenue South, #A Nashville, TN 37203	None	Public	Capital campaign for new immigrant center	\$50,000
David Lipscomb University 3901 Granny White Pike Nashville, TN 37204	None	School	Lipscomb's Global Hope Program	\$25,000
Davidson County Sheriff's Office 506 2nd Avenue North Nashville, TN 37201	None	Governmental Unit	Culinary program	\$50,000
Franklin Road Academy 4700 Franklin Road Nashville, TN 37220	None	School	Challenge grant in support of capital campaign	\$1,000,000
Heritage Foundation of Franklin and Williamson County PO Box 723 Franklin, TN 37064	None	Public	Capital Support	\$300,000
Lewis County Imagination Library 206 South Court Street Hohenwald, TN 38462	None	Governmental Unit	Programming support to provide age appropriate books monthly to preschool children county-wide.	\$13,500

Metarrix Medical College 1005 Dr. D.B. Todd Jr. Blvd Nashville, TN 37208	None	School	Capital campaign for new campus center	\$2,400,000
Nashville Symphony One Symphony Place Nashville, TN 37201	None	Public	Endowment for operations (part of a \$5 million request of the Turner family collectively)	\$500,000
Nelson Andrews Leadership Center 3088 Smith Springs Rd. Anniston, TN 37013	None	Public	Operations support	\$720,000
Positive MPact, Inc PO Box 3410 Brentwood, TN 37024	None	Public	Operations support	\$100,000
Princeton Theological Seminary Post Office Box 821 Princeton, NJ 08542-0803	None	School	Funding to support two Timothy Scholars at the Princeton Theological Seminary	\$76,300
Vanderbilt University Divinity School 411 21st Avenue South Nashville, TN 37240 Nashville, TN 37240	None	School	Turner Leadership Scholars Program	\$205,000
YMCA of Middle Tennessee 1000 Church Street Nashville, TN 37203	None	Public	Nelson Andrews Leadership Center	\$300,000
YMCA of Middle Tennessee 1000 Church Street Nashville, TN 37203	None	Public	Support for YC AP funding for 2013	\$100,000
Young Life Nashville P.O. Box 120681 Nashville, TN 37212	None	Public	Wydolife director position	\$20,000
Total				<u><u>\$7,054,800</u></u>