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Form **990-PF** 

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

OMB No 1545-0052

Department of the Treasury Note The foundation may be able to use a copy of this return to satisfy state reporting requirements. For calendar year 2012 or tax year beginning and ending Name of foundation A Employer identification number THE J.H. WALKER LEGACY FOUNDATION 45-1859070 C/O STERLING FOUNDATION MANAGEMENT, LLC Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 2325 DULLES CORNER BLVD, SUITE 670 703-437-9720 City or town, state, and ZIP code C If exemption application is pending, check here HERNDON, VA 20171 Initial return of a former public charity G Check all that apply: Initial return D 1. Foreign organizations, check here Final return Amended return Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year | J | Accounting method: | X | Cash Accruai If the foundation is in a 60-month termination (from Part II, col (c), line 16) Other (specify) under section 507(b)(1)(B), check here 759,691. (Part I, column (d) must be on cash basis) ▶\$ Analysis of Revenue and Expenses
(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) Part I (c) Adjusted net (a) Revenue and (d) Disbursements (b) Net investment for charitable purposes (cash basis only) expenses per books income income 173,404 N/A 1 Contributions, gifts, grants, etc., received 2 Check if the foundation is not required to attach Sch. B. Interest on savings and temporary cash investments 3 10,370. 10,370. STATEMENT Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 239,079 6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all 663,837. b assets on line 6a 239,079 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain Income modifications 9 Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) 11 Other income 422,853. 249,449 12 Total Add lines 1 through 11 0. 13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits Expenses 16a Legal fees b Accounting fees c Other professionalifees (ED STMT 9,212. 3,332. 1,697. Interest= Administrative 17 тМт 7,335 3 18 40 Taxes NOV 1 2013 Depreciation and depletion 19 decupancy 20 Travel, contracts and meetings 21 22 Printing and publications 23 Other expenses 24 Total operating and administrative 16,547 1,697. expenses Add lines 13 through 23 3,372. 42,000. 42,000. 25 Contributions, gifts, grants paid en 26 Total expenses and disbursements 58,547 43,697. Add lines 24 and 25 3,372 27 Subtract line 26 from line 12 364,306 a Excess of revenue over expenses and disbursements 246,077. b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-)

Form **990-PF** 

THE J.H. WALKER LEGACY FOUNDATION C/O STERLING FOUNDATION MANAGEMENT

	1111 33	50-FF (2012) C/O SIERDING FOUNDATION			- 1859070 Page 2
F	art	Balance Sheets Attached schedules and amounts in the description column should be for end of-year amounts only	Beginning of year (a) Book Value	(b) Book Value	of year (c) Fair Market Value
-	T <sub>1</sub>	Cash - non-interest-bearing	(a) book value	57.	
	1	Savings and temporary cash investments	25,383.	7,769.	
		Accounts receivable	23,303.	1,103.	1,103.
	"	Less: allowance for doubtful accounts			
	4	Pledges receivable			
	'	Less: allowance for doubtful accounts			
	5	Grants receivable			
		Receivables due from officers, directors, trustees, and other		1	
		disqualified persons			
	7	Other notes and loans receivable		<del></del>	
	-	Less, allowance for doubtful accounts			
হ	8	Inventories for sale or use		1	
Assets	9	Prepaid expenses and deferred charges			
Ä	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock			
	c	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 4	364,886.	749,199.	751,865.
	14	Land, buildings, and equipment: basis			
		Less accumulated depreciation			
	15	Other assets (describe ►)			
_		Total assets (to be completed by all filers)	390,269.	757,025.	759,691.
		Accounts payable and accrued expenses			4
	18	Grants payable	<del></del>	<del></del>	-
Liabilities	19	Deferred revenue	-		-
ij		Loans from officers, directors, trustees, and other disqualified persons  Mortgages and other notes payable			-
Ξ.		Other habilities (describe  OTHER LIABILITIES )	0.	2,450.	-
	**	OTHER HADRIES (describe OTHER HIABITITES)		2,450.	4
	23	Total liabilities (add lines 17 through 22)	0.	2,450.	
		Foundations that follow SFAS 117, check here		2,430.	
		and complete lines 24 through 26 and lines 30 and 31			
Ses	24	Unrestricted	390,269.	754,575.	
au	25	Temporarily restricted	050/2050	73273734	1
Bal	26	Permanently restricted			1
Fund Balance		Foundations that do not follow SFAS 117, check here			1
币		and complete lines 27 through 31			
s or	27	Capital stock, trust principal, or current funds			
Net Assets	28	Paid-in or capital surplus, or land, bldg., and equipment fund			]
ţ	29	Retained earnings, accumulated income, endowment, or other funds			
Š	30	Total net assets or fund balances	390,269.	754,575.	
	31	Total liabilities and net assets/fund balances	390,269.	<u>757,025.</u>	<u> </u>
P	art	III Analysis of Changes in Net Assets or Fund Ba	alances		
_			<u> </u>		
1		net assets or fund balances at beginning of year - Part II, column (a), line 3	ου		200 260
2		st agree with end-of-year figure reported on prior year's return) amount from Part I, line 27a		1	390,269.
		r increases not included in line 2 (itemize)		2	364,306.
		lines 1, 2, and 3		3	754,575.
		eases not included in line 2 (itemize)		5	754,575.
		net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	umn (b), line 30	6	754,575.
					Form <b>990-PF</b> (2012)
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Form 990-PF (2012) C/O STERLING FOUNDATION MANAGEMENT, LLC 45-1859070 Page 3 Part IV Capital Gains and Losses for Tax on Investment Income (b) How acquired (a) List and describe the kind(s) of property sold (e.g., real estate, (c) Date acquired (d) Date sold P - Purchase D - Donation 2-story brick warehouse; or common stock, 200 shs. MLC Co.) (mo., day, yr ) (mo, day, yr.) 1a CHARLES SCHWAB **VARIOUS** 12/18/12 D b CHARLES SCHWAB 12/18/12 D VARIOUS c CAPITAL GAINS DIVIDENDS d е (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 422,258 190,134 232,124. 238,117. Ь 234,624 3,493. 3,462. C 3.462 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)) (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 as of 12/31/69 over col. (j), if any 232,124. 3,493. b 3,462. C d If gain, also enter in Part I, line 7 2 Capital gain net income or (net capital loss) 239,079. 2 If (loss), enter -0- in Part I, line 7 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). If (loss), enter -0- in Part I, line 8 N/A 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. Yes X No Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part Enter the appropriate amount in each column for each year; see the instructions before making any entries. (d)
Distribution ratio
(col. (b) divided by col. (c)) (a) Base period years Calendar year (or tax year beginning in) (c) Net value of noncharitable-use assets (b) Adjusted qualifying distributions 257,168 .000000 0. 2010 2009 2008 2007 2 Total of line 1, column (d) .000000 2 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 .000000 3 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5 372,886. 4 Multiply line 4 by line 3 0. 5 2,461. Enter 1% of net investment income (1% of Part I, line 27b) 6 7 Add lines 5 and 6 2,461. 7 43,697. Enter qualifying distributions from Part XII, line 4 8 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. Form 990-PF (2012)

223521 12-05-12

The STREAM WARKER LIBSACY FOUNDATION MANAGEMENT, LLC   45-1859070   Page 4   Part VII   Excise Tax Based on Investment Income (Section 4940(s), 4940(b), 4940(e), or 4948   see instructions)		"			
Part W  Excise Tax Based on Investment Income (Section 4940(g),	_	THE J.H. WALKER LEGACY FOUNDATION			_
Tak Sewing operating foundations described in section 4940(t)(2) check here ▶ □ and onter *WX on line 1. Date of utings of determation felter:  (attach dropy of later in necessary see instructions)  b Domestic foundations that meet the section 4940(s) requirements in Part V, check here ▶ □ X and eriter 17%  of Part I, Ime 27%  All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, Ime 12, col. (b)  2			<u> </u>		
Date for fulling or determination (letter:	_		ınstru	ICTIO	ns)
b Domestic Countelations that meet the section 4940(e) requirements in Part V, check here	18				
of Part I, line 27b.  A litch definance) bax (idensetic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-)  7 ax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-)  8 3 2, 461.  8 Subtitle A (norme) bax (idensetic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-)  5 Tax based on investment income. Subtract line 4 from line 3.1 zero or less, enter-0-  5 Tax based on investment income. Subtract line 4 from line 3.1 zero or less, enter-0-  5 Tax based on investment income. Subtract line 4 from line 3.1 zero or less, enter-0-  5 Tax based on investment income. Subtract line 4 from line 3.1 zero or less, enter-0-  5 Tax based on investment income. Subtract line 4 from line 3.1 zero or less, enter-0-  6 Be					
a All other domestic foundations eater 2% of the 27b, Exempt foreign organizations selfer 4% of Part I, line 12, oct. (b)  2	t			2,4	<u>61.</u>
2   3 xunder section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3					
3 Add lines 1 and 2 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0·) 5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0· 5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0· 5 Cedist-Psyments: 5 2, 4651. 6 Cedist-Psyments 6 2012 estimated tax payments and 2011 overpayment credited to 2012 6 Exempt foreign organizations - tax withheld at source 6 D					
4 \$ Outstie A (income) bax (domestin section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0- 6 Credits/Payments: a 2012 estimated tax payments and 2011 overpayment credited to 2012 6 Exempt foreign organizations - tax withheld at source 6 Tax paid with application for extension of time to file (Form 8686) 6 Exempt foreign organizations - tax withheld at source 6 Tax paid with application for extension of time to file (Form 8686) 6 Exempt foreign organizations - tax withheld at source 6 Tax due If the total of lines 5 and 8 is more than line 7, enter amount overal 7 Total credits and payments. Add lines 6 at through 64 8 A 9. 8 A 9. 9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount overal 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 12 Fine the harmount of line 10 to the Creditet to 2012 sestimated tax 1, 190 . Returned by 11 1 0 0.  Part VIII-A Statements Regarding Activities 1 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campagn?  b Did it spend more than \$100 during the year (either directly or indirectly) for political puriposes (see instructions for definition)?  If the answer is "Vas" to 1 ao r 1s, attach a declared description of the activities and copies of any maternals published or distributed by the foundation in connectron with the activities 0 Did its pendindon line Form 1120-POI, for the system of the activities and copies of any maternals published or distributed by the foundation here form 1120-POI, for the system of the activities in the changes and the operation of the activities in the activities in the changes and the provision of the activities in the part of the activities in the changes and the political pages and	2				
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-6 Credits/Payments:  a 2012 estimated tax payments and 2011 overpayment credited to 2012  b Exempt foreign organizations - tax withhold at source  c Tax paid with application for extension of time to life (form 8868)  d Backup withholding erroneously withheld  7 Total credits and payments. Add lines 6a through 6d  8 Enter any penalty for underpayment of estimated tax. Check here I form 2220 is attached  8 Enter any penalty for underpayment of estimated tax. Check here I form 2220 is attached  9 Tax due If the total of times 5 and 8, enter the amount owed  10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount ower in the amount of lines 5 and 8, enter the amount ower. If the 7 is more than the total of lines 5 and 8, enter the amount overpaid  11 Enter the amount of line 10 to be: Oredited to 2013 estimated tax   12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign?  12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign?  13 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign?  14 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign?  15 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign?  16 During the tax year, did the foundation of the activities.  17 During the tax year, did the foundation of the activities.  18 During the tax year is a fact of the state of the tax year.  19 During the tax year, did the foundation made any changes, or prov	3			2,4	
5 CreditisFayments: a 2012 estimated tax payments and 2011 overpayment credited to 2012 b Exempt troregin organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) 6 B 3, 500. 6 B 3, 500. 7 Total credits and payments. Add lines 8a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here in 1f Form 2220 is attached 9 Tax due If the total of lines 5 and 8 is more than his 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Total redits amount of line 10 to be: Credited to 2013 estimated tax. 12 Total redits and payments. Add lines 8 at through 6d 8 Enter any penalty for underpayment of estimated tax. Check here in 16 Total redits and payments. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Total redits amount of line 10 to be: Credited to 2013 estimated tax. 11 Finds the amount of line 10 to be: Credited to 2013 estimated tax. 11 Total redits amount of line 10 to be: Credited to 2013 estimated tax. 11 Total redits amount of line 10 to be: Credited to 2013 estimated tax. 12 Total redits amount of line 10 to be: Credited to 2013 estimated tax. 13 Total spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 15 It has answer is "Yes" to 1 a 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. 15 It has the foundation his form 1120-70L for this year? 16 Total redits and the foundation managers. In the second political purposes (see instructions for definition)? 18 It was there alknow a political sepanditures (section 4955) imposed during the year. 19 If the foundation have unrelated business gross income of \$1,000 or more during the year? 10 Total redits and the foundation redits tha	4				
a 2012 estimated tax payments and 2011 overpayment credited to 2012 b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8858) d Backup withholding erroneously withheld 7 Total credits and payments. Add times 5a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here I of Form 2220 is attached 9 Tax due If the total of times 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount ower 11, 1900. Refunded 11 1, 1900. 11 Enter the amount of line 10 to be: Oredited to 2013 estimated tax ≥ 1, 1900. Refunded 11 1, 190	5	<del></del>		<u>2,4</u>	<u>61.</u>
b Exempt foreign organizations - tax withheld at source  C Tax paid with application for extension of time to file (Form 8868)  6 Backup withholding erroneously withheld  7 Total credits and payments. Add lines 6a through 6d  8 Enter any penalty for underpayment of estimated tax. Check here I if Form 2220 is attached  8 A 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed  10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  11 Enter the amount of time 10 to be: Credited to 2013 estimated tax. Part 11 is enter amount or time 10 to be: Credited to 2013 estimated tax. Part 12 is enter amount or time 10 to be: Credited to 2013 estimated tax. Part 12 is enter amount or time 10 to be: Credited to 2013 estimated tax. Part 12 is enter amount or time 10 to be: Credited to 2013 estimated tax. Part 12 is enter amount or time 10 to be: Credited to 2013 estimated tax. Part 12 is enter amount or time 10 to be: Credited to 2013 estimated tax. Part 12 is enter 11 is enter 12 is entered to 11 is entered to 12 is entered to 11 is entered to 1	6				
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d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6 a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If time 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2913 estimated tax. ▶ 1, 190. Refunded № 11 0.    Part VII-A   Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes (see instructions for definition)? 1b It spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b It was any political campaign? 1c It 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 1c Clin the foundation. ► \$ 0 a. (2) On foundation managers. ► \$ 0.  1c Enter the reimbursement (if any) paid by the foundation during the year. 1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.  2 Has the foundation angaged many activities that have not previously been reported to the IRS? 1// "Yes," attach a detailed description of the activities. 3 Has the foundation angaged many activities that have not previously reported to the IRS? 1// "Yes," attach a detailed description of the activities. 3 Has the foundation angaged many activities that have not previously reported to the IRS? 1// "Yes," attach a detailed description of the activities. 3 Has the foundation angaged many activities that have not previously reported to the IRS? 1// "Yes," attach a description of the activities. 3 Has the foundation are minimal instruments? 4 A 2 A 4 A 4 A 4	ł	· · · · · · · · · · · · · · · · · · ·			
7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due If the total of lines 5 and 8 is more than the 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2013 estimated tax ► 1, 190. Retunded ► 10 1, 190.    Part VII-A   Statements Regarding Activities 1	(	: Tax paid with application for extension of time to file (Form 8868)  6c 3,500.			
8 Enter any penalty for underpayment of estimated tax. Check here	(	Backup withholding erroneously withheld 6d			
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10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  11 Enter the amount of line 10 to be: Credited to 2013 estimated tax ▶ 1,190 . Refunded ▶ 11 0.0.  Peart VII-A Statements Regarding Activities  1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campagin?  1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?  1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?  1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?  1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?  1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?  1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?  1c Did 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 this part in \$100 during the year?  1c Did the foundation have in 1120-P0, for this year?  2c A Bush the foundation in application of the activities.  3 Has the foundation have air least business gross income of \$1,000 or more during the year?  3 H "Yes," attach a detailed description of the activities.  4 Did the foundation have unrelated business gross income of \$1,000 or more during the year?  1 H "Yes," attach the statement required by General Instruction of the changes  4 Did the foundation have unrelated business gross income of \$1,000 or more during the year?  1 H "Yes," attach the statement required by General Instruction of the sta	8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here if Form 2220 is attached 8			<u>49.</u>
11 Eiter the amount of line 10 to be: Credited to 2013 estimated tax ▶ 1, 190. Retunded ▶ 11 0. Part VII-A Statements Regarding Activities  1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?  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?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year.  (1) On the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0.  2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities.  3 Has the foundation made any changes, not previously reported to the IRS?  If "Yes," attach a detailed description of the activities.  4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  b If Yes, "has it filed a tax return on Form 990-T for this year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  7 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  8 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, or  9 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?  If "Yes," complete Part II, col (c), and Part XV  b If the answer is "Yes" to l	9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed			
Part VIII-A   Statements Regarding Activities	10			<u>1,1</u>	<u>90.</u>
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			9		X
	10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STMT 5	10	X	

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Pa	rt 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		Х
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		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	х	
	Website address ► N/A			
14	The books are in care of ► STERLING FOUNDATION MANAGEMENT  Telephone no. ► (703) 4	37-	972	n
17	Located at ► 2325 DULLES CORNER BLVD, STE 670, HERNDON, VA ZIP+4 ►20		<u>,, ,</u>	<u> </u>
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	1/1		<u></u>
13	and enter the amount of tax-exempt interest received or accrued during the year	NT	/A	ш
10	——————————————————————————————————————		Yes	No
10	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank,	ı	162	
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1. If "Yes," enter the name of the foreign			
Do	country  Int VII-B   Statements Regarding Activities for Which Form 4720 May Be Required	<u> </u>		
Га		1	V	NI.
	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 X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available			
	for the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"	1		
	ıf the foundation agreed to make a grant to or to employ the official for a period after			
	termination of government service, if terminating within 90 days.)			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
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		х
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)):			
а	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?			
h	If "Yes," list the years \( \bigs_{} \), \( \text{years below } \), \( \text{years below } \), \( \text{years below } \), \( years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect			
U	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach			ŀ
	statement - see instructions.)  N/A	2b		}
_		20		
C	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.			
	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
3 a				
	during the year?			
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? (Use Schedule C,			
	Form 4720, to determine if the foundation had excess business holdings in 2012 ) N/A	3b		
	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 2012?	4b		X

THE J.H. WALKER LEGACY FOUNDATION Form 990-PF (2012) 45-1859070 C/O STERLING FOUNDATION MANAGEMENT, Page 6 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: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations 5b section 53.4945 or in a current notice regarding disaster assistance (see instructions)? N/A 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 \_\_\_\_ Yes [ expenditure responsibility for the grant? N/A 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 Yes X No a personal benefit contract? 6b Х b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870 Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/AInformation About Officers, Directors, Trustees, Foundation Managers, Highly Part VIII Paid Employees, and Contractors 1 List all officers, directors, trustees, foundation managers and their compensation. (d) Contributions to employee benefit plans and deferred compensation (e) Expense account, other (c) Compensation (b) Title, and average hours per week devoted to position (If not paid, (a) Name and address allowances JULIE WALKER PRESIDENT/DIRECTOR 15 KINGS CROWN COURT 0. MORAGA, CA 94556 1.00 0 0 THOMAS WALKER SECRETARY/DIRECTOR 15 KINGS CROWN COURT MORAGA, CA 94556 1.00 0 О. 0. PHILIP WALKER TREASURER/DIRECTOR 15 KINGS CROWN COURT MORAGA, CA 94556 1.00 0 0 0. 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average (e) Expense account, other hours per week devoted to position (a) Name and address of each employee paid more than \$50,000 (c) Compensation allowances NONE

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

Form 990-PF (2012) C/O STERLING FOUNDATION MANAGEMENT		1859070 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter "NO	NE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	1.000	
Total number of others receiving over \$50,000 for professional services		<u>▶</u>   0
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical in number of organizations and other beneficiaries served, conferences convened, research papers produced		Expenses
1 N/A	, 616.	
1 N/A		
2		
3		
4		
10.201.		
Part IX-B   Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on lines	1 and 2.	Amount
1 N/A		
2		
All other program-related investments. See instructions.	"	
3		
Total Add lines 1 through 3	•	0

Form 990-PF (2012) C/O STERLING FOUNDATION MANAGEMENT. 45-1859070 Page 8 Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) 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 375,801. 1a 2,763. Average of monthly cash balances 1b c Fair market value of all other assets 10 378,564. d Total (add lines 1a, b, and c) 1d Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e 0. Acquisition indebtedness applicable to line 1 assets 378,564. Subtract line 2 from line 1d 3 5,678. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 372,886. 5 Minimum investment return. Enter 5% of line 5 18,644. Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain and do not complete this part.) foreign organizations check here Minimum investment return from Part X, line 6 18,644. 2a Tax on investment income for 2012 from Part VI, line 5 2a 2,461 Income tax for 2012. (This does not include the tax from Part VI.) 2b 2,461. Add lines 2a and 2b 2c Distributable amount before adjustments. Subtract line 2c from line 1 3 16,183. Recoveries of amounts treated as qualifying distributions 4 0. 16,183. Add lines 3 and 4 5 Deduction from distributable amount (see instructions) 6 16.183. Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 43,697. 1a Program-related investments - total from Part IX-B 1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required) 3a Cash distribution test (attach the required schedule) Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 43,697. Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

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

Form 990-PF (2012)

6

2,461.

41,236.

income. Enter 1% of Part I, line 27b

Adjusted qualifying distributions Subtract line 5 from line 4

4940(e) reduction of tax in those years.

C/O STERLING FOUNDATION MANAGEMENT, LLC

Part XIII Undistributed Income (see	nstructions)			
	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				16,183.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			2,020.	
b Total for prior years:			•	
		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007				
<b>b</b> From 2008				
c From 2009				
d From 2010				
e From 2011				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2012 from				
Part XII, line 4: ► \$ 43,697.				
a Applied to 2011, but not more than line 2a			2,020.	
<b>b</b> Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2012 distributable amount				16,183.
e Remaining amount distributed out of corpus	25,494.			
5 Excess distributions carryover applied to 2012	0.			0.
(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	25,494.			
<b>b</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 instructions		0.		
e Undistributed income for 2011. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
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)	0.			
8 Excess distributions carryover from 2007				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2013.				
Subtract lines 7 and 8 from line 6a	25,494.			
10 Analysis of line 9:				
a Excess from 2008				
<b>b</b> Excess from 2009				
c Excess from 2010				
d Excess from 2011				
a Eyress from 2012 25 494				

Form 990-PF (2012) C/O STERLING FOUNDATION MANAGEMENT, LLC 45-1859070 Page 10 Part XIV | Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a 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 4942(j)(3) or 4942(1)(5) b Check box to indicate whether the foundation is a private operating foundation described in section Prior 3 years 2 a Enter the lesser of the adjusted net Tax year (a) 2012 (d) 2009 (b) 2011 (c) 2010 (e) Total 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 Complete 3a, b, or c for the alternative test relied upon: "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 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 instructions.) 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).) JULIE WALKER 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 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here  $\blacktriangleright$  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: STERLING FOUNDATION MANAGEMENT, LLC, 703-437-9720 2325 DULLES CORNER BLVD, STE 670, HERNDON, VA 20171 b The form in which applications should be submitted and information and materials they should include: NONE PRESCRIBED 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: RECOGNIZED SECTION 501(C)(3) CHARITABLE ORGANIZATIONS ONLY

C/O STERLING FOUNDATION MANAGEMENT, LLC Form 990-PF (2012) 45-1859070 Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to Foundation Purpose of grant or Amount any foundation manager status of contribution Name and address (home or business) or substantial contributor recipient a Paid during the year SECOND HARVEST OF COASTAL GEORGIA NONE 501(C)(3) GENERAL SUPPORT 2501 EAST PRESIDENT STREET SAVANNAH, GA 31401 15,000. WAKE COUNTY BOYS AND GIRLS CLUB NONE 501(C)(3) GENERAL SUPPORT 701 RALEIGH BLVD. RALEIGH, NC 27610 25,000. OPEN ARMS MINISTRIES NONE 501(C)(3) GENERAL SUPPORT P.O. BOX 6605 2,000. CHULA VISTA, CA 91909 **▶** 3a Total 42,000. **b** Approved for future payment NONE

Total

Part XVI-A Analysis of Income-Produ	cina Activities
-------------------------------------	-----------------

nter gross amounts unless otherwise indicated	Unrelated business income			section 512, 513, or 514	(e)
·	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt
Program service revenue:	code	Amount	sion code	Amount	function income
a					
b					
C					
d					
e					
f					
g Fees and contracts from government agencies					
Membership dues and assessments					
Interest on savings and temporary cash investments					
Dividends and interest from securities			14	10,370.	
Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
Net rental income or (loss) from personal					
property					
Other investment income					
Gain or (loss) from sales of assets other					
than inventory			18	239,079.	
Net income or (loss) from special events					
Gross profit or (loss) from sales of inventory					
Other revenue:			- t - 1		
a					
b					
C	ļļ				
d					
e					
Subtotal. Add columns (b), (d), and (e)			0.	249,449.	
3 Total Add line 12, columns (b), (d), and (e)				13	249,449
See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities	to the Accom	plishment of	Exempt Pu	ırposes	
Line No Explain below how each activity for which inci					

Line No	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of						
LIIIE NO	the foundation's exempt purposes (other than by providing funds for such purposes).						
	the foundation 3 exempt party oces (other than by providing futios for such purposes).						
	ALL SOURCES OF REVENUE ARE USED TO INVEST IN SECURITIES OR						
	HELD AS CASH. INCOME FROM THESE INVESTMENTS ARE THEN USED						
	FOR CHARITABLE PURPOSES AS DETERMINED BY THE BOARD OF						
	DIRECTORS, IN ACCORDANCE WITH THE FOUNDATION'S EXEMPT						
	PURPOSE.						

C/O STERLING FOUNDATION MANAGEMENT, LLC

45-1859070

Page 13

Form **990-PF** (2012)

Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No 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 1a(1) Х Х (2) Other assets 1a(2) **b** Other transactions 1b(1) (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization Х 1b(2) Х (3) Rental of facilities, equipment, or other assets 1b(3) (4) Reimbursement arrangements 1b(4) Х (5) Loans or loan guarantees Х 1b(5) Х (6) Performance of services or membership or fundraising solicitations 1b(6) Х c Sharing of facilities, equipment, mailing lists, other assets, or paid employees d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization N/A 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described X No in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes 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 May the IRS discuss this return with the preparer true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge Sign shown below (see instr.)? Here X Yes ve of officer or trustee Date -Fitte rint/Type preparer's name Check [ Preparer's signature ıf Date self- employed BARRY B. BONDROFF, Paid P00087387 Preparer Firm's name ► GORFINE, SCHILLER & Firm's EIN  $\triangleright$  52-1231901 PA Use Only Firm's address ► 10045 RED RUN BLVD, SUITE 250 OWINGS MILLS, MD 21117 Phone no 410-356-5900

Form 990-PF (2012)

Part XVII

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

Department of the Treasury Internal Revenue Service

Name of the organization

# **Schedule of Contributors**

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

OMB No 1545-0047

Employer identification number

_	THE J.H. WALKER LEGACY FOUNDATION	45 1050050
Organization type (ch	C/O STERLING FOUNDATION MANAGEMENT, LLC neck one)	45-1859070
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	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private foundation	
	501(c)(3) taxable private foundation	
Note. Only a section 5  General Rule  X For an organic contributor (	ation is covered by the <b>General Rule</b> or a <b>Special Rule</b> . 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special sization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in Complete Parts I and II	
Special Rules		
509(a)(1) and	501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the r I 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of that on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II	
total contribu	501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one conditions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or each of cruelty to children or animals. Complete Parts I, II, and III	
contributions If this box is of purpose Do	501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one core for use exclusively for religious, charitable, etc., purposes, but these contributions did not checked, enter here the total contributions that were received during the year for an exclusion not complete any of the parts unless the <b>General Rule</b> applies to this organization becaus tritable, etc., contributions of \$5,000 or more during the year	total to more than \$1,000 vively religious, charitable, etc,
but it <b>must</b> answer "N	tion that is not covered by the General Rule and/or the Special Rules does not file Schedul lo" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on Part IV, line 2, or or on Part IV, l	· · · · · · · · · · · · · · · · · · ·

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

Name of organization

THE J.H. WALKER LEGACY FOUNDATION
C/O STERLING FOUNDATION MANAGEMENT. LLC

Employer identification number

45-1859070

Part I	Contributors (see instructions) Use duplicate copies of Part I	ıf addıtıonal space ıs needed	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	JULIE WALKER  15 KINGS CROWN CT.  MORAGA, CA 94556	ss408,499.	Person Payroll Noncash X (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroli Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution

Person Payroll Noncash

(Complete Part II if there is a noncash contribution)

Name of organization

THE J.H. WALKER LEGACY FOUNDATION
C/O STERLING FOUNDATION MANAGEMENT, LLC

Employer identification number

45-1859070

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed	Part II
---	---------

-ait II	Noticash Property (see instructions) Use duplicate copies of Pr	art ii ii additionai space is needed	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_1	VARIOUS STOCKS		
		\$ 408,499.	12/11/12
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		 \$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3453 12-21	I-12		00, 990-EZ, or 990-PF) (20

Schedule B (Form 990, 990-EZ, or 990-PF) (2012) Page 4 Name of organization Employer identification number THE J.H. WALKER LEGACY FOUNDATION C/O STERLING FOUNDATION MANAGEMENT 45-1859070 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 exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) > \$ 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 (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from Part I (d) Description of how gift is held (b) Purpose of gift (c) Use of gift (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

FORM 990-PF DIVIDEND	S AND	INTER	EST FROM	SECU	RITIES	STATEMENT 1
SOURCE		GROSS	AMOUNT		ITAL GAINS IVIDENDS	COLUMN (A) AMOUNT
CHARLES SCHWAB	•		13,832.		3,462.	10,370.
TOTAL TO FM 990-PF, PART I, I	.N 4		13,832.		3,462.	10,370.
FORM 990-PF C	THER	PROFES	SIONAL FE	EES		STATEMENT 2
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM	
FOUNDATION MANAGEMENT FEES INVESTMENT FEES		7,350. 1,862.		,470. ,862.		1,697.
TO FORM 990-PF, PG 1, LN 16C =		9,212.	3 ,	,332.		1,697.
FORM 990-PF		TAX	ES	-		STATEMENT 3
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM	
EXCISE TAXES FOREIGN TAXES		7,295. 40.		0. 40.		0.
TO FORM 990-PF, PG 1, LN 18		7,335.		40.		0.
FORM 990-PF	ОТН	ER INV	ESTMENTS			STATEMENT 4
DESCRIPTION			LUATION ETHOD	вос	OK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB		-	COST		749,199.	751,865.
TOTAL TO FORM 990-PF, PART II	, LIN	E 13			749,199.	751,865.

THE J.H. WALKER LI	EGACY FOUNDATION C/O ST	45-1859	070
FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	5
NAME OF CONTRIBUTOR	ADDRESS		
JULIE WALKER	15 KINGS CROWN CT. MORAGA, CA 94556		

Unrealized Gain & Loss As of 12/31/2012

WALKE7 - J.H. WALKER LEGACY FOUNDATION 4 Acct #: 15481496

Description	Symbol	Trade Date	Ouantity	Cost Basis	Current Price	Current Value (	Unrealized Gain (Loss)	Unrealized Long Gain	Unrealized Short Gain	Unit Cost	% G/L
Cash Cash CASH	CASH			7,826.46		7,826.46					
International Equity Developed Mkts Mutual Discovery Fd Cl A Wintergreen Fund	TEDIX WGRNX	07/14/2011 07/14/2011	800.437 1,502.867	23,300.90 22,564.83 45,865.73	28.270	22,628.35 22,693.29 45,321.64	(672.55) 128.46 (544.09)	(541.33) 207.28 (334.05)	(131.22) (78.82) (210.04)	29.110 15 015	-2.9% 0.6% -1.2%
Emerging Mkts Matthews Asian Growth & Incom MACSX	MACSX	07/14/2011	2,474.573	44,846.12	18.610	46,051.80	1,205.68	1,003.09	202.59	18.123	2.7%
			ı	90,711.85	1	91,373.44	661.59	669 04	(7.45)	I	0 7%
U.S. Equity U.S. Large Cap Harbor Cap Appreciation JP Morgan Equity Income Oakmark Select Fund Schwab Fund Large-Cap	HCAIX OIEIX OAKLX SFLNX	05/02/2012 03/27/2012 07/14/2011 07/14/2011	449.911 5,906.677 1,340.785 5,601.177	19,276.73 60,820.29 41,794.07 58,759.75	41.960 10.160 30.970 10.740	18,878.27 60,011.84 41,524.11 60,156.64	(398.46) (808.45) (269.96) 1,396.89	(31 31) 1,834.44	(398.46) (808.45) (238.65) (437.55)	42.846 10.297 31.171 10.491	-2 1% -1 3% -0.6% 2 4%
				180,650.84		180,570.86	(79.98)	1,803.13	(1,883.11)		%0.0
U.S. Mid Cap Goldman Sachs Small Mid	GSMAX	04/20/2012	984.124	15,112.12	15.470	15,224.40	112.28		112.28	15.356	0.7%
U.S. Small Cap Baron Small Cap	BSCFX	09/26/2012	581.302	15,134.38	26.220	15,241.74	107.36		107.36	26.035	0.7%
			1	210,897.34	ĺ	211,037.00	139.66	1,803.13	(1,663.47)	ı	0.1%

Unrealized Gain & Loss As of 12/31/2012

WALKE7 - J.H WALKER LEGACY FOUNDATION 4 Acct #: 15481496

Description	Symbol	Trade Date	Ouantity	Cost Basis	Current Price	Current Value	Current Unrealized Unrealized  Value Gain (Loss) Long Gain	Unrealized Long Gain	Unrealized Short Gain	Unit	% G/L
Bonds Interm-Term Bonds JPMorgan High Yield Loomis Sayles Bond Fund Ret Loomis Sayles Investment Pimco Total Return Fund	OHYFX LSBRX LIGSZ PTTDX	03/05/2012 01/26/2012 01/26/2012 07/14/2011	3,734.569 3,027.975 3,010.666 3,391.683	30,127.07 44,709.87 37,987.51 38,001.38	8.140 15.060 12.620 11.240	30,399.39 45,601.30 37,994.60 38,122.52 152,117.81	272.32 891.43 7.09 121.14 1,291.98	282.91	272.32 891.43 7.09 (161.77)	8.067 14.766 12.618 11.204	0 9% 2.0% 0.0% 0.3% 0.9%
Sht-Term Bonds Doubleline Total Return Pimco Short Term Fund Schwab S/T Bd Mkt Fund	DLTNX PSHDX SWBDX	09/26/2012 07/14/2011 10/18/2011	5,371.526 3,850.953 21,290.788	61,222.67 38,029.16 197,511.81 296,763.64	11.330 9.880 9.320	60,859.39 38,047.42 198,430.14 297,336.95	(363.28) 18.26 918.33 573.31	(2.44) 614.65 612.21	(363.28) 20.70 303.68 (38.90)	11.398 9.875 9.277	0.6% 0.0% 0.5% 0.2%
Company of the state of the sta		Congress of American Congress		757,025.12		.,665.57 €.759,69 <u>1.66</u> €. 2,66 <u>6</u> 35 <u>4</u>	2,666.54	3,367.29	(700.75)		0.4%

Form 8868 (Rev 1-2013)						Dogo O
If you are filing for an Additional (Not Automatic) 3-Month E	ytension (	complete only Part II and check the	s box			Page 2
Note. Only complete Part II if you have already been granted an				8868		LAU .
If you are filing for an Automatic 3-Month Extension, compl		•		0000.		
Part II Additional (Not Automatic) 3-Month I			al (no c	opies r	needed).	
		Enter filer's	•			ructions
Type or Name of exempt organization or other filer, see instr	ructions				ation number	
print THE J.H. WALKER LEGACY FOUN		N	. ,			(,
File by the C/O STERLING FOUNDATION MAN	NAGEME:	NT, LLC		45-	185907	0
due date for Number, street, and room or suite no. If a P.O. box.			Social se		ımber (SSN)	
return See 2325 DULLES CORNER BLVD, SU	JITE 6	70		•	` ,	
Instructions City, town or post office, state, and ZIP code. For a					-	
HERNDON, VA 20171	_					
			·			
Enter the Return code for the return that this application is for (fi	ile a separa	te application for each return)				0 4
				_		
Application	Return	Application				Return
Is For	Code	Is For				Code
Form 990 or Form 990-EZ	01					
Form 990-BL	02	Form 1041-A				80
Form 4720 (individual)	03	Form 4720				09
Form 990-PF	04	Form 5227				10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069				11
Form 990-T (trust other than above)	06	Form 8870		_		12
STOP! Do not complete Part II if you were not already grante			ously file	ed Form	8868.	
STERLING FOUND						
<ul> <li>The books are in the care of ► 2325 DULLES CO</li> </ul>	DRNER		RNDON	, VA	20171	
Telephone No. $\triangleright (703)437-9720$		FAX No. >				
<ul> <li>If the organization does not have an office or place of busines</li> </ul>						Ш
If this is for a Group Return, enter the organization's four digr	_					
box ► If it is for part of the group, check this box ►			all memb	ers the e	xtension is f	or
4 I request an additional 3-month extension of time until	NOVEM					
5 For calendar year 2012, or other tax year beginning		, and endin			<del></del>	
6 If the tax year entered in line 5 is for less than 12 months,	check reas	on: Initial return	Final i	eturn		
Change in accounting period						
7 State in detail why you need the extension	DDEDA	RE A COMPLETE AND	A COTTO	7 M E 1	DEMITTON	
ADDITIONAL TIME IS NEEDED TO	PREPA	RE A COMPLETE AND	ACCUR	AIL I	KETOKN	•
<del></del>					*	
8a If this application is for Form 990-BL, 990-PF, 990-T, 4720	or 6069 a	enter the tentative tay less any	-	1	·	
nonrefundable credits. See instructions.	, 01 0009, 6	inter the teritative tax, less arry	8a	s	3	,700.
b If this application is for Form 990-PF, 990-T, 4720, or 6069	enter any	refundable credits and estimated	Oa	3		, /00.
tax payments made. Include any prior year overpayment a	-					
previously with Form 8868.	allowed as a	a credit and any amount paid	8b	\$	2	700.
c Balance due, Subtract line 8b from line 8a. Include your p	navment with	th this form if required by using	- 80	<b>3</b>		, 100 •
EFTPS (Electronic Federal Tax Payment System) See inst	•	ir this form, ir required, by using	8c	s		0.
		st be completed for Part II		Ψ		<u> </u>
Under penalties of perjury, I declare that I have examined this form, inclu		· ·	-	f mv knou	viedne and hol	ıef
it is true, correct, and complete, and that I am authorized to prepare this	form.		5001 0	. my know		,
Signature > Mun & West Title >	CA	2 <b>A</b>	Date	<b>•</b>	7/15/13	

7 | 5 | 13 Form **8868** (Rev. 1-2013)