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

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

2012

Open to Public Inspection

For calendar year 2012 or tax year beginning

, 2012, and ending

, 20

Name of foundation IRENE & TUCKER GRIGG FOUNDATION		A Employer identification number 54-1694119
Number and street (or P O box number if mail is not delivered to street address) 117 SHOCKOE SLIP	Room/suite	B Telephone number (see instructions) 804-783-1488
City or town, state, and ZIP code RICHMOND, VA 23219		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply. <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 305161	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	7553	7553		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	12073			
	b Gross sales price for all assets on line 6a 55773				
	7 Capital gain net income (from Part IV, line 2)		12073		
	8 Net short-term capital gain			-0-	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule) SCH #1	30	30			
12 Total. Add lines 1 through 11	19656	19656	-0-		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) SCH #1	165			165
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule) SCH #1	3876	3876		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) SCH #1	77	19		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) SCH #1	25			25
	24 Total operating and administrative expenses. Add lines 13 through 23	4143	3895	-0-	190
	25 Contributions, gifts, grants paid	14354			14354
26 Total expenses and disbursements. Add lines 24 and 25	18497	3895	-0-	14544	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	1159				
b Net investment income (if negative, enter -0-)		15761			
c Adjusted net income (if negative, enter -0-)			-0-		

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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	8760	25885	25885
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see 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) S.C.H. #2	215911	199985	279276
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶			
Liabilities	Less: accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	224671	225870	305161
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
Net Assets or Fund Balances	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)			
	Foundations that follow SFAS 117, check here . . . ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	10028	10028	
	29 Retained earnings, accumulated income, endowment, or other funds	214643	215842	
	30 Total net assets or fund balances (see instructions)	224671	225870	
	31 Total liabilities and net assets/fund balances (see instructions)	224671	225870	

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	224671	
2 Enter amount from Part I, line 27a	2	1159	
3 Other increases not included in line 2 (itemize) ▶ RETURN OF CAPITAL-TRANSATLANTIC HOLDINGS	3	40	
4 Add lines 1, 2, and 3	4	225870	
5 Decreases not included in line 2 (itemize) ▶	5	-0-	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	225870	

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE SCHEDULE #3			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

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

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	12073
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	-0-

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	8571	295820	.03
2010	7099	274479	.03
2009	27400	250391	.11
2008	21512	353751	.06
2007	19873	421839	.05

2	Total of line 1, column (d)	2	.28
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	.06
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	302924
5	Multiply line 4 by line 3	5	18175
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	158
7	Add lines 5 and 6	7	18333
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	14544

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	315	
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	315	
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	315	
6	Credits/Payments:			
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7		
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	315	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11	Enter the amount of line 10 to be: Credited to 2013 estimated tax Refunded	11		

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?	Yes	No
1a			X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?		X
1b			X
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?		X
1c			X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ <u>NONE</u> (2) On foundation managers. ► \$ <u>NONE</u>		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ <u>NONE</u>		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2	X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	N/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5	X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
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	X
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ► <u>VIRGINIA</u>		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ▶ N/A				
14	The books are in care of ▶ THE FOUNDATION		Telephone no. ▶ 804-783-1488	
Located at ▶ 117 SHOCKOE SLIP, RICHMOND, VA		ZIP+4 ▶ 23219-4121		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. ▶ <input type="checkbox"/>			
and enter the amount of tax-exempt interest received or accrued during the year		15	N/A	
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	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶				X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b	N/A
Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>		
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	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 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.)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

- 5a** During the year did the foundation pay or incur any amount to:
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No
- b** If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No
- Organizations relying on a current notice regarding disaster assistance check here ☐ ☒
- c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No
- If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No
- If "Yes" to 6b, file Form 8870.
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No
- b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
S. TUCKER GRIGG, JR., 254 W. 27TH ST. COTTAGE 264, SEA ISLAND, GA	PRESIDENT	-0-	=0-	-0-
S. TUCKER GRIGG, III, 31561 401 N. BELMONT AVE., RICHMOND, VA 23221	DIRECTOR	-0-	-0-	-0-
ELEANOR GRIGG BAIRD, 2425 KINGS WAY, AUGUSTA, GA 30904	DIRECTOR	-0-	-0-	-0-
	NOMINAL	-0-	-0-	-0-

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 ☐

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
NONE		

Total number of others receiving over \$50,000 for professional services ▶

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 NONE	
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 N/A	
2	
All other program-related investments. See instructions.	
3 N/A	
Total. Add lines 1 through 3 ▶	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	277293
b	Average of monthly cash balances	1b	30244
c	Fair market value of all other assets (see instructions)	1c	-0-
d	Total (add lines 1a, b, and c)	1d	307537
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	-0-
2	Acquisition indebtedness applicable to line 1 assets	2	-0-
3	Subtract line 2 from line 1d	3	307537
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	4613
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	302924
6	Minimum investment return. Enter 5% of line 5	6	15146

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	15146
2a	Tax on investment income for 2012 from Part VI, line 5	2a	315
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	315
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	14831
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	14831
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	14831

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	14544
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	14544
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	14544

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				14831
2 Undistributed income, if any, as of the end of 2012:				
a Enter amount for 2011 only			14136	
b Total for prior years: 20____, 20____, 20____		-0-		
3 Excess distributions carryover, if any, to 2012:				
a From 2007				
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: ► \$ 14544				
a Applied to 2011, but not more than line 2a			14136	
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				408
e Remaining amount distributed out of corpus	-0-			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	-0-			-0-
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	-0-			
b Prior years' undistributed income. Subtract line 4b from line 2b		-0-		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		-0-		
d Subtract line 6c from line 6b. Taxable amount—see instructions		-0-		
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount—see instructions			-0-	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				14423
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	-0-			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)	-0-			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	-0-			
10 Analysis of line 9:				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				
e Excess from 2012				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling **▶**

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

	Tax year	Prior 3 years			(e) Total
	(a) 2012	(b) 2011	(c) 2010	(d) 2009	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon.					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

S. TUCKER GRIGG, JR.

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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.

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

c Any submission deadlines:

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SEE SCHEDULE #4				
Total			▶ 3a	14354
b <i>Approved for future payment</i>				
Total			▶ 3b	- 0 -

IRENE AND TUCKER GRIGG FOUNDATION
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SCHEDULE #1

PART I
LINE 11

COLUMN A COLUMN B

CASH IN LIEU - ALLEGHANY

\$30 \$30

\$30 \$30

PART I
LINE 16A

COLUMN A COLUMN B COLUMN D

WORD & WORD PLC

\$165 \$165

\$165 \$165

PART I
LINE 16C

COLUMN A COLUMN B COLUMN D

MERRILL LYNCH INVESTMENT FEE
MERRILL LYNCH CONSULTS FEE

\$150 \$150
\$3,726 \$3,726

\$3,876 \$3,876 \$0

PART I
LINE 18

COLUMN A COLUMN B COLUMN D

EXCISE TAX BASED ON INVESTMENT INCOME
FOREIGN DIVIDEND TAX

\$58
\$19 \$19

\$77 \$19 \$0

PART I
LINE 23

COLUMN A COLUMN B COLUMN D

STATE CORPORATION COMMISSION FILING FEE

\$25 \$25

IRENE AND TUCKER GRIGG FOUNDATION
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SCHEDULE #2

PART II
LINE 10B

	NO OF SHARES	BOOK VALUE	FAIR MARKET VALUE
AIR PRODUCTS & CHEMICAL	49	\$4,275	\$4,117
ALLEGHANY	12	\$3,537	\$4,025
AGILENT TECHNOLOGIES	116	\$2,909	\$4,749
AMERIPRISE FINANCIAL	58	\$2,101	\$3,633
AMERICAN EXPRESS	327	\$13,641	\$18,796
BERKSHIRE HATHAWAY	149	\$8,538	\$13,365
BANK OF NEW YORK MELLON	602	\$17,313	\$15,472
BED BATH & BEYOND	160	\$7,051	\$8,946
CVS CAREMARK	377	\$11,607	\$18,227
CANADIAN NATURAL RESOURCES	232	\$8,272	\$6,697
COSTCO	219	\$9,299	\$21,621
COCA COLA	132	\$3,531	\$4,785
DIAGEO PLC SPSD ADR	83	\$5,407	\$9,676
DEVON ENERGY	134	\$4,854	\$6,974
DISNEY	148	\$6,083	\$7,369
EXPRESS SCRIPTS	114	\$4,626	\$6,156
EOG RESOURCES	151	\$7,376	\$18,240
GOOGLE	10	\$4,470	\$7,073
HARLEY DAVIDSON	204	\$8,604	\$9,961
HEWLETT PACKARD	98	\$3,666	\$1,397
IRON MOUNTAIN	154	\$3,145	\$4,782
LOEWS	313	\$7,625	\$12,755
MONSANTO	58	\$4,364	\$5,490
MICROSOFT	97	\$2,806	\$2,591
OCCIDENTAL PETE	162	\$7,714	\$12,411
ORACLE	82	\$2,295	\$2,732
PHILIP MORRIS INTL	60	\$1,556	\$5,018
PFIZER	153	\$2,774	\$3,837
POTASH	71	\$3,183	\$2,889
PROGRESSIVE	414	\$7,518	\$8,735
TEXAS INSTRUMENTS	179	\$4,136	\$5,529
TRANSOCEAN	36	\$2,961	\$1,608
WELLS FARGO	574	\$12,748	\$19,620
		\$199,985	\$279,276
		=====	=====

IRENE AND TUCKER GRIGG FOUNDATION
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SCHEDULE #3

PART IV
LINE 1

A	A	A	B	C	D	E	F	G	H
12	SHARES	AGILENT TECHNOLOGIES	P	11808	11012	471	0	404	67
13	SHARE	AMERIPRISE FINANCIAL	P	83104	11012	674	0	403	271
50	SHARES	BERKSHIRE HATHAWAY	P	83104	11012	3,864	0	2,865	999
37	SHARES	CANADIAN NATURAL RES	P	120707	11012	1,448	0	1,245	203
13	SHARES	DEVON ENERGY	P	83104	11012	853	0	418	435
1	SHARES	EXPRESS SCRIPTS	P	22508	11012	50	0	33	17
9	SHARES	HARLEY DAVIDSON	P	92105	11012	360	0	447	(87)
93	SHARES	IRON MOUNTAIN	P	111904	11012	2,978	0	1,914	1,064
4	SHARES	IRON MOUNTAIN	P	20305	11012	128	0	76	52
3	SHARES	JOHNSON AND JOHNSON	P	102108	11012	196	0	193	3
3	SHARES	LOCKHEED MARTIN	P	111110	11012	243	0	211	32
24	SHARES	MICROSOFT	P	92105	11012	672	0	618	54
28	SHARES	MICROSOFT	P	33106	11012	783	0	763	20
27	SHARES	OCCIDENTAL PETE	P	83104	11012	2,649	0	691	1,958
13	SHARES	PFIZER	P	11910	11012	284	0	259	25
17	SHARES	PROGRESSIVE	P	10308	11012	335	0	316	19
5	SHARES	TEXAS INSTRUMENTS	P	52308	11012	153	0	158	(5)
25	SHARES	WELLS FARGO	P	83104	11012	736	0	732	4
1	SHARES	TRANSATLANTIC HOLDINGS	P	83104	31212	61	0	55	6
21	SHARES	GRUPO TELEVISA	P	111908	33012	442	0	294	148
82	SHARES	GRUPO TELEVISA	P	111908	40212	1,760	0	1,148	612
81	SHARES	KRAFT FOODS	P	21111	32912	3,064	0	2,475	589
36	SHARES	MERCK	P	111008	42412	1,379	0	540	839
40	SHARES	BAXTER INTERNATIONAL	P	72810	60812	2,022	0	1,763	259
38	SHARES	BECTON DICKINSON	P	61609	61812	2,790	0	2,553	237
27	SHARES	JOHNSON AND JOHNSON	P	102108	70912	1,833	0	1,738	95
20	SHARES	JOHNSON AND JOHNSON	P	30509	70912	1,358	0	959	399
44	SHARES	JOHNSON AND JOHNSON	P	92409	70912	2,987	0	2,675	312
15	SHARES	JOHNSON AND JOHNSON	P	21710	70912	1,018	0	960	58
6	SHARES	JOHNSON AND JOHNSON	P	42710	70912	407	0	388	19
18	SHARES	JOHNSON AND JOHNSON	P	61410	70912	1,222	0	1,056	166
30	SHARES	LOCKHEED MARTIN	P	111110	71912	2,654	0	2,109	545
43	SHARES	MERCK	P	111008	71212	1,846	0	645	1,201
37	SHARES	MERCK	P	30309	71212	1,589	0	625	964
70	SHARES	MERCK	P	31809	71212	3,006	0	1,887	1,119
14	SHARES	MERCK	P	120709	71212	601	0	515	86
50	SHARES	MERCK	P	21010	71212	2,147	0	1,821	326
44	SHARES	MERCK	P	120210	71212	1,889	0	1,548	341
213	SHARES	SEALED AIR	P	10308	112612	3,647	0	4,881	(1,234)
36	SHARES	SEALED AIR	P	10308	112712	613	0	825	(212)
33	SHARES	SEALED AIR	P	121608	112712	561	0	494	67

55,773	0	43,700	12,073
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SCHEDULE #4

PART XV

LINE 3A

COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
CHILD FUND INTERNATIONAL 2821 EMERYWOOD PARKWAY RICHMOND, VA 23294	N/A	PUBLIC	SPONSOR TO UNDERPRIVILEGED CHILDREN	504
ST CHRISTOPHER'S SCHOOL FOUNDATION 711 ST CHRISTOPHER'S ROAD RICHMOND, VA 23226	N/A	PRIVATE	SUPPORT FOR QUALITY EDUCATION	2,100
CYSTIC FIBROSIS FOUNDATION 6931 ARLINGTON ROAD BETHESDA, MD 20814	N/A	PUBLIC	PROVIDES ONGOING RESEARCH IN FINDING A CURE FOR CF	8,900
FAITHWORKS P O BOX 2902 BRUNSWICK, GA 31521	N/A	PUBLIC	OFFERS MINISTRIES AND ASSISTANCE TO GLYNN COUNTY	500
ST SIMONS PRESBYTERIAN CHURCH 205 KING'S WAY ST SIMONS ISLAND, GA 31522	N/A	PUBLIC	TO BENEFIT THE PLEDGE TO CHURCH SERVICES	1,500
GAY HATCHER PRISON MINISTRIES 2734 PEACHTREE ROAD 201 ATLANTA, GA 30305	N/A	PUBLIC	TO PROVIDE THERAPY AND SUPPORT TO RELEASED WOMEN	350
HUMANE SOCIETY OF SOUTH COASTAL GEORGIA 4627 US HIGHWAY 17 N BRUNSWICK, GA 31525	N/A	PUBLIC	TO PROVIDE FOR A BETTER FUTURE FOR ALL ANIMALS	500

14,354
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