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SHORT YEAR RETURN, CHANGE OF ACCOUNTING PERIOD

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

OMB No 1545-0052

2012

Open to public inspection

Form **990-PF**

Department of the Treasury
Internal Revenue Service

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 **OCT 1, 2012**, and ending **DEC 31, 2012**

Name of foundation J. MARION SIMS FOUNDATION, INC.		A Employer identification number 57-0355295
Number and street (or P O box number if mail is not delivered to street address) P.O. BOX 818	Room/suite	B Telephone number (803) 286-8772
City or town, state, and ZIP code LANCASTER, SC 29721		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 checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		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) \$ 66,077,844. (Part I, column (d) must be on cash basis.)	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	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))		(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			N/A	
	2 Check <input checked="" 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	941,053.	941,053.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	856,938.			
	b Gross sales price for all assets on line 6a	1,186,280.			
	7 Capital gain net income (from Part IV, line 2)		856,938.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 Total. Add lines 1 through 11	1,797,991.	1,797,991.		
	13 Compensation of officers, directors, trustees, etc	64,573.	7,355.		57,219.
	14 Other employee salaries and wages	65,955.	7,097.		60,726.
	15 Pension plans, employee benefits	12,785.	1,376.		<7,704.>
	16a Legal fees				
	b Accounting fees				
	c Other professional fees STMT 2	123,601.	122,926.		496.
	17 Interest				
	18 Taxes STMT 3	29,619.	0.		0.
	19 Depreciation and depletion				
	20 Occupancy	6,693.	1,004.		7,963.
	21 Travel, conferences, and meetings	31,614.	2,836.		26,467.
	22 Printing and publications				
	23 Other expenses STMT 4	23,440.	1,890.		17,599.
	24 Total operating and administrative expenses. Add lines 13 through 23	358,280.	144,484.		162,766.
	25 Contributions, gifts, grants paid	72,379.			300,485.
	26 Total expenses and disbursements. Add lines 24 and 25	430,659.	144,484.		463,251.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	1,367,332.			
	b Net investment income (if negative, enter -0-)		1,653,507.		
	c Adjusted net income (if negative, enter -0-)			N/A	

223501
12-05-12

LHA For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2012)

17200610 133675 L41360

2012.03050 J. MARION SIMS FOUNDATION,

L41360_1

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		213,887.	152,622.	152,622.
	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				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use		13,761.	12,093.	12,093.
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 6		63,528,589.	64,605,098.	64,605,098.
	c	Investments - corporate bonds				
11	Investments - land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
14	Land, buildings, and equipment basis ▶ 1,233,222.					
	Less accumulated depreciation ▶ 308,239.		918,475.	924,983.	924,983.	
15	Other assets (describe ▶ STATEMENT 7)		357,553.	383,048.	383,048.	
16	Total assets (to be completed by all filers)		65,032,265.	66,077,844.	66,077,844.	
Liabilities	17	Accounts payable and accrued expenses		24,255.	31,521.	
	18	Grants payable		766,130.	538,024.	
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶ STATEMENT 8)		212,934.	240,954.	
23	Total liabilities (add lines 17 through 22)		1,003,319.	810,499.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted		64,028,946.	65,267,345.	
	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				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances		64,028,946.	65,267,345.	
	31	Total liabilities and net assets/fund balances		65,032,265.	66,077,844.	

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	64,028,946.
2	Enter amount from Part I, line 27a	2	1,367,332.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	65,396,278.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 5	5	128,933.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	65,267,345.

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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 PUBLICLY TRADED SECURITIES		VARIOUS	VARIOUS
b CAPITAL GAINS DIVIDENDS			
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 349,820.		329,342.	20,478.
b 836,460.			836,460.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			20,478.
b			836,460.
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	856,938.
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	{ }	3	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.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	3,183,858.	60,760,785.	.052400
2010	3,154,415.	62,279,663.	.050649
2009	3,761,139.	60,380,483.	.062291
2008	3,822,334.	53,939,123.	.070864
2007	3,475,255.	75,001,739.	.046336

2 Total of line 1, column (d)	2	.282540
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	.056508
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	63,046,467.
5 Multiply line 4 by line 3	5	3,562,630.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	16,535.
7 Add lines 5 and 6	7	3,579,165.
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	468,266.

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)		1	33,070.
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			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	33,070.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	33,070.
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	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	49,700.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	49,700.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	103.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	16,527.	
11 Enter the amount of line 10 to be: Credited to 2013 estimated tax <input type="checkbox"/> 16,527. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 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.		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> SC		
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	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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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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 ► **WWW.JMSIMS.ORG**

14 The books are in care of ► **JAMES T. MORTON, PRESIDENT** Telephone no. ► **(803) 286-8774**
 Located at ► **800 NORTH WHITE STREET, LANCASTER, SC** ZIP+4 ► **29721**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year ► **15** **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? ☐ 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 ►

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 checked="" type="checkbox"/> Yes <input 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)? Organizations relying on a current notice regarding disaster assistance check here		<input checked="" 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?		<input checked="" type="checkbox"/>
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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<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.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		<input checked="" type="checkbox"/>
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?		<input checked="" type="checkbox"/>

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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)?

☐ 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)?

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 expenditure responsibility for the grant?

N/A

☐ 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?

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?

N/A

5b

6b

7b

X

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.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 9		40,585.	23,988.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

0

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

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 information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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.

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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	63,733,549.
b	Average of monthly cash balances	1b	135,082.
c	Fair market value of all other assets	1c	137,934.
d	Total (add lines 1a, b, and c)	1d	64,006,565.
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	64,006,565.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	960,098.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	63,046,467.
6	Minimum investment return. Enter 5% of line 5 ADJUSTED FOR SHORT TAX PERIOD	6	794,575.

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	794,575.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	33,070.
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	33,070.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	761,505.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	761,505.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	761,505.

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	463,251.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	5,015.
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	468,266.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	468,266.

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.

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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				761,505.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007				
b From 2008	1,139,268.			
c From 2009	848,923.			
d From 2010	137,237.			
e From 2011	188,617.			
f Total of lines 3a through e	2,314,045.			
4 Qualifying distributions for 2012 from Part XII, line 4: ► \$	468,266.			
a Applied to 2011, but not more than line 2a			0.	
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				468,266.
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))	293,239.			293,239.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,020,806.			
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	2,020,806.			
10 Analysis of line 9:				
a Excess from 2008	846,029.			
b Excess from 2009	848,923.			
c Excess from 2010	137,237.			
d Excess from 2011	188,617.			
e Excess from 2012				

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

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

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

NONE

- 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:

JAMES T. MORTON, PRESIDENT, (803) 286-8772
800 NORTH WHITE STREET, PO BOX 818, LANCASTER, SC 29721

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

AVAILABLE AT [HTTP://WWW.JMSIMS.ORG](http://www.jmsims.org)

- c Any submission deadlines:**

AVAILABLE AT [HTTP://WWW.JMSIMS.ORG](http://WWW.JMSIMS.ORG)

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

AVAILABLE AT [HTTP://WWW.JMSIMS.ORG](http://www.jmsims.org)

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 Paid during the year				
SEE STATEMENT 11 ATTACHED	NONE	PUBLIC CHARITY	SUPPORT THE CHARITABLE PURPOSE OF THE RECIPIENT	300,485.
Total			▶ 3a	300,485.
b Approved for future payment				
SEE STATEMENT 11 ATTACHED	NONE	PUBLIC CHARITY	SUPPORT THE CHARITABLE PURPOSE OF THE RECIPIENT	38,438.
Total			▶ 3b	38,438.

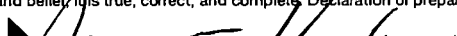
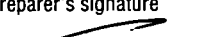
Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

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

[illegible]

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

b If "Yes," complete the following schedule.		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, this true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.				May the IRS discuss this return with the preparer shown below (see instr.)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
	 Signature of officer or trustee		7/29/13 Date		PRESIDENT Title		
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature		Date	Check <input type="checkbox"/> if self-employed	PTIN
	GREGORY W. HAYES				7-18-13		P00054246
	Firm's name ► MOORE STEPHENS TILLER LLC					Firm's EIN ► 58-0673524	
	Firm's address ► 1960 SATELLITE BOULEVARD, STE 3600 DULUTH, GA 30097					Phone no. 770-995-8800	

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
PUBLICLY TRADED SECURITIES	1,777,513.	836,460.	941,053.
TOTAL TO FM 990-PF, PART I, LN 4	1,777,513.	836,460.	941,053.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT/CONSULTING	122,645.	122,645.		0.
INVESTMENT CUSTODIAL FEES	200.	200.		0.
PAYROLL SERVICES	0.	0.		0.
RETIREMENT PLAN ADMINISTRATION	756.	81.		496.
TO FORM 990-PF, PG 1, LN 16C	123,601.	122,926.		496.

FORM 990-PF	TAXES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	32,960.	0.		0.
DEFERRED FEDERAL EXCISE TAX	<3,341.>	0.		0.
TO FORM 990-PF, PG 1, LN 18	29,619.	0.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BOARD EXPENSES	<825.>	<165.>		0.	
COMMUNICATIONS & COMMUNITY/PUBLIC RELATIONS	251.	0.		193.	
GRANT PROGRAM EXPENSES	10,005.	0.		8,929.	
INSURANCE	4,608.	750.		474.	
MISC/OTHER	440.	0.		<111.>	
OFFICE/POSTAGE EXPENSE	6,344.	952.		6,019.	
ORGANIZATIONAL AFFILIATIONS	490.	0.		490.	
PROFESSIONAL DEVELOPMENT	1,170.	353.		817.	
SUBSCRIPTIONS & PUBLICATIONS	957.	0.		788.	
TO FORM 990-PF, PG 1, LN 23	23,440.	1,890.		17,599.	

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES			STATEMENT	5
DESCRIPTION	AMOUNT				
UNREALIZED DEPRECIATION ON INVESTMENT PORTFOLIO	128,932.				
ROUNDING	1.				
TOTAL TO FORM 990-PF, PART III, LINE 5	128,933.				

FORM 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
EQUITY & FIXED INCOME MUTUAL FUND INVESTMENTS (STATEMENT 10)	64,605,098.	64,605,098.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	64,605,098.	64,605,098.		

FORM 990-PF	OTHER ASSETS	STATEMENT	7
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
PREPAID FEDERAL EXCISE TAX	16,920.	0.	0.
SECURITY DEPOSITS	160.	160.	160.
DUE FROM INSURANCE PROVIDER ON EMBEZZLEMENT LOSS	340,473.	382,888.	382,888.
TO FORM 990-PF, PART II, LINE 15	357,553.	383,048.	383,048.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	8
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
FEDERAL EXCISE TAX PAYABLE	59,336.	75,375.
DEFERRED FEDERAL EXCISE TAX	100,115.	96,774.
RETIREMENT PLAN LIABILITY	53,483.	68,805.
TOTAL TO FORM 990-PF, PART II, LINE 22	212,934.	240,954.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	9
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
R. MALCOLM EDWARDS, MD 800 NORTH WHITE STREET, P.O. BOX 818 LANCASTER, SC 29721	BOARD CHAIR 6.00	825.	0.	0.
ROBERT K. FOLKS 800 NORTH WHITE STREET, P.O. BOX 818 LANCASTER, SC 29721	VICE CHAIR 4.00	275.	0.	0.
PHYLLIS B. BUNKLEY 800 NORTH WHITE STREET, P.O. BOX 818 LANCASTER, SC 29721	TREASURER 4.00	275.	0.	0.
PAMELA Y. TEMPLE 800 NORTH WHITE STREET, P.O. BOX 818 LANCASTER, SC 29721	SECRETARY 4.00	275.	0.	0.
JAMES T. MORTON 800 NORTH WHITE STREET, P.O. BOX 818 LANCASTER, SC 29721	PRESIDENT 45.00	36,185.	23,988.	0.
MIRIAM M. BOUCHER 800 NORTH WHITE STREET, P.O. BOX 818 LANCASTER, SC 29721	TRUSTEE 4.00	525.	0.	0.
TIMOTHY H. HALLMAN 800 NORTH WHITE STREET, P.O. BOX 818 LANCASTER, SC 29721	TRUSTEE 4.00	275.	0.	0.
CHARLES M. HARRELL 800 NORTH WHITE STREET, P.O. BOX 818 LANCASTER, SC 29721	TRUSTEE 4.00	475.	0.	0.
POLLY C. JACKSON 800 NORTH WHITE STREET, P.O. BOX 818 LANCASTER, SC 29721	TRUSTEE 4.00	525.	0.	0.

J. MARION SIMS FOUNDATION, INC.

57-0355295

STANLEY D. JOHNSON
800 NORTH WHITE STREET, P.O. BOX
818
LANCASTER, SC 29721

TRUSTEE

4.00

525.

0.

0.

HUBERT F. MOBLEY
800 NORTH WHITE STREET, P.O. BOX
818
LANCASTER, SC 29721

TRUSTEE

4.00

150.

0.

0.

MARVIN L. STARKS
800 NORTH WHITE STREET, P.O. BOX
818
LANCASTER, SC 29721

TRUSTEE

4.00

275.

0.

0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

40,585.

23,988.

0.



STATEMENT 10

Investment Report

December 1, 2012 - December 31, 2012

Envelope 021487543
J MARION SIMS FOUNDATION INC
PO BOX 818
LANCASTER SC 29721-0818

Online
Customer Service
Fidelity.com
800-732-4990

Your Advisor

FUND EVALUATION GROUP, LLC
201 EAST FIFTH STREET
SUITE 1600
CINCINNATI OH 45202
Phone: (513)977-4400

Holdings	(Symbol) as of December 31, 2012	Quantity December 31, 2012	Price per Unit December 31, 2012	Total Cost Basis	Total Value December 1, 2012	Total Value December 31, 2012	Unrealized Gain (Loss) December 31, 2012
Mutual Funds 100% of holdings							
	ARTISAN INTERNAT'L INVESTOR CLASS (ARTIX)	138,456.782	\$24.590	\$2,876,873.50	\$3,345,405.64	\$3,404,652.26	\$ 527,778.76
	DIMENSIONAL EMERGING MKTS VAL PRTF INSTL (DFEVX)	100,030.429	29.840	3,545,272.29	2,781,606.12	2,984,908.00	- 560,364.29
	DFA INT'L SMALL CAP VALUE (DISVX)	106,592.745	15.980	1,663,263.09	1,603,335.41	1,703,352.06	40,088.97



STATEMENT 10

Investment Report

December 1, 2012 - December 31, 2012

J MARION SIMS FOUNDATION INC

Holdings (Symbol) as of December 31, 2012	Quantity December 31, 2012	Price per Unit December 31, 2012	Total Cost Basis	Total Value December 31, 2012	Total Value December 31, 2012	Unrealized Gain (Loss) December 31, 2012
DFA US SMALL CAP VALUE PRFT INSTL (DFSVX)	126,027.749	26.210	2,752,673.19	3,184,598.99	3,303,187.30	550,514.11
GATEWAY FUND CLASS Y (GTEYX)	105,618.774	27.110	2,719,749.28	2,858,141.52	2,863,324.96	143,575.68
HARBOR INTERNATIONAL INSTITUTIONAL FD (HAINX)	55,159.827	62.120	3,147,037.60	3,337,621.53	3,426,528.45	279,490.85
HARBOR CAPITAL APPRECIAT INSTL (HACAX)	98,382.235	42.520	3,271,914.51	4,156,747.42	4,183,212.63	911,298.12
ING GLOBAL REAL ESTATE CLASS I (IGLIX)	187,150.521	18.050	3,234,003.54	3,335,371.84	3,378,066.90	144,063.36
LOOMIS SAYLES BOND INSTL (LSBDX)	221,427.424	15.120	3,139,100.54	3,319,967.46	3,347,982.65	208,882.11
PIMCO TOTAL RETURN INSTL (PTTRX)	962,286.421	11.240	11,110,225.67	10,882,259.29	10,816,099.37	-294,126.30
PIMCO REAL RETURN BOND INSTL CLASS (PRRIX)	264,726.268	12.270	3,010,101.22 ^c	3,285,605.61	3,248,191.30	238,090.08
PIMCO ALL ASSET INST CLASS (PAAIX)	265,576.652	12.580	3,367,006.00	3,327,895.34	3,340,954.28	-26,051.72
TEMPLETON GLOBAL BOND ADVISOR CLASS (TGBAX)	245,506.407	13.340	3,392,166.35	3,226,726.68	3,275,055.46	-117,110.89
VANGUARD WINDSOR II ADMIRAL (VWNAX)	84,809.820	52.130	3,598,135.23	4,347,672.60	4,421,135.91	823,000.68
VANGUARD MID CAP INDEX SIGNAL (VMISX)	103,234.732	32.180	2,693,602.05	3,241,577.54	3,322,093.67	628,491.62
VANGUARD 500 INDEX SIGNAL SHS (VIFSX)	39,635.404	108.520	3,483,107.54	4,262,308.80	4,301,234.04	818,126.50
WASATCH SMALL CAP GROWTH (WAAEX)	79,562.128	41.290	2,766,904.59	3,230,904.28	3,285,120.26	518,215.67
Subtotal of Mutual Funds			59,771,136.19		64,605,099.50	4,833,963.31

Core Account 0% of holdings

CASH	4,721.000	1.000	not applicable	104,840.80	4,721.00	not applicable
Subtotal of Core Account					4,721.00	

Total

\$ 59,771,136.19

\$64,609,820.50

\$ 4,833,963.31

All positions held in cash account unless indicated otherwise

c - Cost basis information (or proceeds from short sales) has been provided by you or a third party (such as a transferring broker) and has not been adjusted except as otherwise indicated

Cost Basis - the original amount paid for a security, including the amount of reinvested dividends and capital gains, plus or minus certain adjustments. See last page of statement for details Total Cost Basis does not include the cost basis on core, money market or other positions where cost basis is unknown or not applicable

Transaction Details

(for holdings with activity this period)

STATEMENT 11

J Marion Sims Foundation, Inc
Schedule of appropriations and payments
December 31, 2012

Schedule of Appropriations and Payments**Fiscal Year 2012**

9/30/2012 thru 12/31/2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amended 2012	Amount Paid 2012	Ending Balance 2012
CareNet, Inc. 338 West Meeting Street Medical Arts V, Suite H Lancaster, SC 29720 Care Health Center \$430,491 00 2012		\$107,622 75	\$0 00	\$0 00	\$107,622 75	\$0 00
Chester County Literacy Council PO 2045 Chester, SC 29706 ALC II Literacy 101- GAPP \$69,900 00 2012	501c(3)	\$69,900 00	\$0 00	\$0 00	\$8,737 50	\$61,162 50
Chester County School District 109 Hinton Street Chester, SC 29706 SOS (Save Our Students) \$40,830 00 2012		\$40,830 00	\$0 00	\$0 00	\$0 00	\$40,830 00
Chester County School District 109 Hinton Street Chester, SC 29706 Sandy Jordan (joint with Abby Brunson) "Lunch with Leaders" Lewisville High \$496 00 2013		\$0 00	\$496 00	\$0 00	\$496 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 Abby Brunson (joint with Sandy Jordan) "Lunch with Leaders" Lewisville High School \$496 00 2013		\$0 00	\$496 00	\$0 00	\$496 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 Carol Rachels "Teen Entrepreneur Business Plan" Lewisville High School \$480 00 2013		\$0 00	\$480 00	\$0 00	\$480 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 Jerry Digh "I 2 3 Chin It" Lewisville Middle \$495 00 2013		\$0 00	\$495 00	\$0 00	\$495 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 Leslev Stewart "Reading is Fun" Lewisville Elementary \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 Lisa Creighton "Extra, Extra Read All About It" Lewisville Elementary \$297 00 2013		\$0 00	\$297 00	\$0 00	\$297 00	\$0 00

STATEMENT 11

J Marion Sims Foundation, Inc
Schedule of appropriations and payments
December 31, 2012

Schedule of Appropriations and Payments

Fiscal Year 2012

9/30/2012 thru 12/31/2012

Recipient and/or Purpose Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
	2012	2012	2012	2012	2012
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Lisa Tait</i> <i>"A LMS Writing Project"</i> <i>Lewisville Middle School</i> \$459 00 2013	\$0 00	\$459 00	\$0 00	\$459 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Marilyn Presslev</i> <i>"Teaching for Thinking in Art"</i> <i>Lewisville Elementary</i> \$499 00 2013	\$0 00	\$499 00	\$0 00	\$499 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Neely Crawford (joint with Christina Elam)</i> <i>"Motivating Mathematical Minds"</i> <i>Lewisville Elementary</i> \$277 00 2013	\$0 00	\$277 00	\$0 00	\$277 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Kim Nash (joint with Jo Yoder)</i> <i>"Math Stars"</i> <i>Lewisville Elementary</i> \$500 00 2013	\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Jo Yoder (joint with Kim Nash)</i> <i>"Math Stars"</i> <i>Lewisville Elementary</i> \$500 00 2013	\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Felicia McGowan</i> <i>"Watch Dogs"</i> <i>Lewisville Elementary</i> \$500 00 2013	\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Elizabeth McDonald</i> <i>"We Have Putting to Do!"</i> <i>Great Falls Elementary</i> \$500 00 2013	\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Christina Elam (joint with Neely Crawford)</i> <i>"Motivating Mathematical Minds"</i> <i>Lewisville Elementary</i> \$277 00 2013	\$0 00	\$277 00	\$0 00	\$277 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Betty Thorne</i> <i>"Movin Math in 2012-2013"</i> <i>Lewisville Middle School</i> \$500 00 2013	\$0 00	\$500 00	\$0 00	\$500 00	\$0 00

STATEMENT 11

J. Marion Sims Foundation, Inc
Schedule of appropriations and payments
December 31, 2012

Schedule of Appropriations and Payments**Fiscal Year 2012**

9/30/2012 thru 12/31/2012

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
		2012	2012	2012	2012	2012
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Alison Howe</i> <i>"Animal Antics"</i> <i>Great Falls Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>April Clinton</i> <i>"Kindle Free Time"</i> <i>Lewisville Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Kenda Wilhams</i> <i>"Star Lab"</i> <i>Lewisville Middle</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Jacqueline Lowry (joint with Suzanne Hough)</i> <i>"What's the Connection"</i> <i>Lewisville Elementary</i> \$433 00 2013		\$0 00	\$433 00	\$0 00	\$433 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Suzanne Hough (joint with Jacqueline Lowry)</i> <i>"What's the Connection"</i> <i>Lewisville Elementary</i> \$433 00 2013		\$0 00	\$433 00	\$0 00	\$433 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>David Reed</i> <i>"U.S. History is Front Page News"</i> <i>Great Falls Elementary</i> \$476 00 2013		\$0 00	\$476 00	\$0 00	\$476 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Cheri Collins</i> <i>"Red, White & Blue American Through and Through"</i> <i>Great Falls Elementary</i> \$496 00 2013		\$0 00	\$496 00	\$0 00	\$496 00	\$0 00
Chester County School District 109 Hinton Street Chester, SC 29706 <i>Elihu Bey</i> <i>"Scholastic Math Magazine"</i> <i>Lewisville Middle</i> \$137 00 2013		\$0 00	\$137 00	\$0 00	\$137 00	\$0 00
The Childrens' Council Post Office Box 171 Lancaster, SC 29721 <i>ALC II - Skills for Success</i> \$94,852 00 2012	501c(3)	\$94,852 00	\$0 00	\$0 00	\$11,856 50	\$82,995 50

STATEMENT 11

J Marion Sims Foundation, Inc Schedule of appropriations and payments December 31, 2012

Schedule of Appropriations and Payments

Fiscal Year 2012

9/30/2012 thru 12/31/2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amended 2012	Amount Paid 2012	Ending Balance 2012
Christian Services Inc. 101 S White Street Lancaster, SC 29720 <i>ALC Phase II "Up with Literacy and Basic Skills"</i> \$47,246 00 2011	501c(3)	\$23,623 00	\$0 00	\$0 00	\$5,905 75	\$17,717 25
Faith, Hope, & Victory Christian Church P O Box 2787 Lancaster, SC 29721 <i>ALC - II The Community Powerhouse</i> \$57,459 00 2012	501c(3)	\$57,459 00	\$0 00	\$0 00	\$7,182 37	\$50,276 63
HOPE in Lancaster, Inc. P O Box 166 Lancaster, SC 29721 <i>2011-2012 Helping Those in Crisis</i> \$465,000 00 2011	Approved	\$232,500 00	\$0 00	\$0 00	\$0 00	\$232,500 00
Housing Authority of Lancaster County, Inc P O Box 1235 Lancaster, SC 29721 <i>ALC Phase I Map to Success Family Literacy Program</i> \$101,208 00 2011	Governmental	\$50,604 00	\$0 00	\$0 00	\$12,651 00	\$37,953 00
Carolinas Literacy Network (fka -Lancaster Area Literacy Cooperative) P O Box 1076 Lancaster, SC 29721 <i>Lancaster Area Literacy Cooperative</i> \$501,951 65 2011	501c(3)	\$260,792 32	\$0 00	-\$34,438 99	\$75,451 11	\$150,902 22
Lancaster County Educational Foundation Post Office Box 889 Lancaster, SC 29721 <i>Project ACCESS</i> \$64,660 00 2011	Educational	\$35,884 40	\$0 00	\$0 00	\$10,692 59	\$25,191 81
Lancaster County Literacy Council 610 East Meeting Street Lancaster, SC 29720 <i>ALC II - Reading for Workplace Success</i> \$73,037 00 2012	501c(3)	\$73,037 00	\$0 00	\$0 00	\$9,129 62	\$63,907 38
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Lancaster High School</i> <i>Kristie Taylor Journalism Teacher</i> <i>Publish Student Newspaper</i> \$500 00 2002		\$100 00	\$0 00	\$0 00	\$0 00	\$100 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Lisa Hallman (joint with Scott Kendrick)</i> <i>"Dream Catchers on My Mind"</i> <i>Buford Middle</i> \$500 00 2009		\$500 00	\$0 00	\$0 00	\$0 00	\$500 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>ALC Phase II Home Literacy Trail</i> \$61,237 00 2011		\$30,618 52	\$0 00	\$0 00	\$7,654 62	\$22,963 90
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Swimming and Water Safety</i> \$55,000 00 2012		\$55,000 00	\$0 00	\$0 00	\$0 00	\$55,000 00

STATEMENT 11

J. Marion Sims Foundation, Inc Schedule of appropriations and payments December 31, 2012

Schedule of Appropriations and Payments

Fiscal Year 2012

9/30/2012 thru 12/31/2012

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
		2012	2012	2012	2012	2012
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Jane Hudson (joint with Mindy Ries)</i> <i>"Get Nooked on Reading"</i> <i>North Elementary School</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Alvina Joyce (joint with Midenna Anderson)</i> <i>"Eat Practice and Learn"</i> <i>McDonald Green Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Amanda Williams</i> <i>"This Ear Isn't Working"</i> <i>Erwin Elementary</i> \$486 00 2013		\$0 00	\$486 00	\$0 00	\$486 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Andrew Grasso</i> <i>"Digital Literacy Skills"</i> <i>South Middle</i> \$450 00 2013		\$0 00	\$450 00	\$0 00	\$450 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Andrew Walker (joint with Emily Dunning)</i> <i>"Interactive Social Studies Software"</i> <i>Indian Land Middle</i> \$468 00 2013		\$0 00	\$468 00	\$0 00	\$468 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Angela McGee (joint with Christin Benda)</i> <i>"Growing Hearts, Growing Minds"</i> <i>North Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Angie Evatt (joint with Joy Duncan)</i> <i>"Classroom Document Camera"</i> <i>Indian Land Elementary</i> \$471 00 2013		\$0 00	\$471 00	\$0 00	\$471 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Christen Benda (joint with Angela McGee)</i> <i>"Growing Hearts Growing Minds"</i> <i>North Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Dana Shull</i> <i>"The Names Bond Ionic Bond"</i> <i>Indian Land High School</i> \$499 00 2013		\$0 00	\$499 00	\$0 00	\$499 00	\$0 00

STATEMENT 11

J Marion Sims Foundation, Inc.
Schedule of appropriations and payments
December 31, 2012

Schedule of Appropriations and Payments**Fiscal Year 2012**

9/30/2012 thru 12/31/2012

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
		2012	2012	2012	2012	2012
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Derelle Ballard</i> <i>"Learning Lounger"</i> Erwin Elementary \$151 00 2013		\$0 00	\$151 00	\$0 00	\$151 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Devin Moore</i> <i>"Versatile Teaching with Versa Tiles"</i> Heath Springs Elementary \$494 00 2013		\$0 00	\$494 00	\$0 00	\$494 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Midenna Anderson (joint with Alysia Joyce)</i> <i>"Eat Practice and Learn"</i> McDonald Green Elementary \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Emily Dunning (joint with Andrew Walker)</i> <i>"Interactive Social Studies Software"</i> Indian Land Middle \$468 00 2013		\$0 00	\$468 00	\$0 00	\$468 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Sherry Blankenship (joint with Lisa Stamper)</i> <i>"Strengthening Little Fingers"</i> Brooklyn Springs \$496 00 2013		\$0 00	\$496 00	\$0 00	\$496 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Sharon Minors</i> <i>"Listen Learn and Practice"</i> Erwin Elementary \$408 00 2013		\$0 00	\$408 00	\$0 00	\$408 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Greta Beaver</i> <i>"Getting Smarter with Smartboard"</i> Erwin Elementary \$472 00 2013		\$0 00	\$472 00	\$0 00	\$472 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Mindy Ries (joint with Jane Hudson)</i> <i>"Get Nooked on Reading"</i> North Elementary \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Michelle Griffin (joint with Jordan Pope)</i> <i>"Writing and Publishing Across Genres"</i> North Elementary \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00

STATEMENT 11

J Marion Sims Foundation, Inc
Schedule of appropriations and payments
December 31, 2012

Schedule of Appropriations and Payments**Fiscal Year 2012**

9/30/2012 thru 12/31/2012

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
		2012	2012	2012	2012	2012
Lancaster County School District		\$0 00	\$498 00	\$0 00	\$498 00	\$0 00
300 S Catawba Street						
Lancaster, SC 29720						
Michael Jenkins						
"Amazing Musicians"						
Brooklyn Springs						
\$498 00						
2013						
Lancaster County School District		\$0 00	\$496 00	\$0 00	\$496 00	\$0 00
300 S Catawba Street						
Lancaster, SC 29720						
Lisa Stamper (joint with Sherry						
Blankenship)						
"Strengthening Little Fingers"						
Brooklyn Springs Elementary						
\$496 00						
2013						
Lancaster County School District		\$0 00	\$455 00	\$0 00	\$455 00	\$0 00
300 S Catawba Street						
Lancaster, SC 29720						
Lisa Bachini						
"Rubik's Cube"						
Indian Land Middle						
\$455 00						
2013						
Lancaster County School District		\$0 00	\$478 00	\$0 00	\$478 00	\$0 00
300 S Catawba Street						
Lancaster, SC 29720						
Kathryn Brasington						
"Math Manipulatives"						
Erwin						
\$478 00						
2013						
Lancaster County School District		\$0 00	\$471 00	\$0 00	\$471 00	\$0 00
300 S Catawba Street						
Lancaster, SC 29720						
Joy Duncan (joint with Angie Evatt)						
"Classroom Document Camera"						
Indian Land Elementary						
\$471 00						
2013						
Lancaster County School District		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
300 S Catawba Street						
Lancaster, SC 29720						
Jordan Pope (joint with Michelle Griffin)						
"Writing and Publishing Across Genres"						
North Elementary						
\$500 00						
2013						
Lancaster County School District		\$0 00	\$488 00	\$0 00	\$488 00	\$0 00
300 S Catawba Street						
Lancaster, SC 29720						
Jenny Nowicki						
"Listen But Don't Look"						
Erwin Elementary						
\$488 00						
2013						
Lancaster County School District		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
300 S Catawba Street						
Lancaster, SC 29720						
Patricia McFadden						
"The PAWS Don't Touch Drugs"						
Erwin Elementary						
\$500 00						
2013						
Lancaster County School District		\$0 00	\$484 00	\$0 00	\$484 00	\$0 00
300 S Catawba Street						
Lancaster, SC 29720						
Michelle Burton						
"Theres An App for That"						
North Elementary						
\$484 00						
2013						

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J. Marion Sims Foundation, Inc
Schedule of appropriations and payments
December 31, 2012

Schedule of Appropriations and Payments**Fiscal Year 2012**

9/30/2012 thru 12/31/2012

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
		2012	2012	2012	2012	2012
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Tiffany Evans (joint with Michael Zachary)</i> <i>"Differentiating for All Students"</i> <i>Indian Land Middle</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Susan Morrison</i> <i>"Jumbie Jams"</i> <i>Indian Land Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Stephanie Gaussett (joint with Cindy Outen)</i> <i>"Brushstrokes"</i> <i>Buiford High School</i> \$269 00 2013		\$0 00	\$269 00	\$0 00	\$269 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Shirneatha Simson (joint with Brenda Jackson)</i> <i>"Here's Jeopardy"</i> <i>Clinton Elementary</i> \$499 00 2013		\$0 00	\$499 00	\$0 00	\$499 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Shawanda George Miller</i> <i>"Typing Masks and Protective Covers"</i> <i>South Middle</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Tisha Simmons</i> <i>"A Hands-on Approach to Reading Using Versa Tiles"</i> <i>A R Rucker Middle</i> \$476 00 2013		\$0 00	\$476 00	\$0 00	\$476 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Rebecca Jones (joint with Iris Curry)</i> <i>"Just Touch It"</i> <i>Erwin Elementary</i> \$495 00 2013		\$0 00	\$495 00	\$0 00	\$495 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Amy Sizemore</i> <i>"Small Groups with Big Results"</i> <i>Indian Land Elementary</i> \$496 00 2013		\$0 00	\$496 00	\$0 00	\$496 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Liz Marshall</i> <i>"Face Jug"</i> <i>A R Rucker Middle</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00

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J. Marion Sims Foundation, Inc.
Schedule of appropriations and payments
December 31, 2012

Schedule of Appropriations and Payments**Fiscal Year 2012**

9/30/2012 thru 12/31/2012

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
		2012	2012	2012	2012	2012
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Jessica Kuchler (joint with Rebecca McCampbell)</i> <i>"Physical Physics"</i> <i>Indian Land Middle</i> \$498 00 2013		\$0 00	\$498 00	\$0 00	\$498 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Iris Curry (joint with Rebecca Jones)</i> <i>"Just Touch It"</i> <i>Erwin Elementary</i> \$495 00 2013		\$0 00	\$495 00	\$0 00	\$495 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Deborah Cole (joint with April Davis)</i> <i>"Seeing is Reading"</i> <i>North Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Cindy Outen (joint with Stephanie Gausser)</i> <i>"Brushstrokes"</i> <i>Buford High</i> \$269 00 2013		\$0 00	\$269 00	\$0 00	\$269 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Brenda Jackson (joint with Shirmetha Stinson)</i> <i>"Here's Jeopardy"</i> <i>Clinton Elementary</i> \$499 00 2013		\$0 00	\$499 00	\$0 00	\$499 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>April Davis (joint with Deborah Cole)</i> <i>"Seeing is Reading"</i> <i>North Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Rebecca McCampbell (joint with Jessica Kuchler)</i> <i>"Physical Physics"</i> <i>Indian Land Middle</i> \$498 00 2013		\$0 00	\$498 00	\$0 00	\$498 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Michael Zachary (joint with Tiffany Evans)</i> <i>"Differentiating for All Students"</i> <i>Indian Land Middle</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00

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J Marion Sims Foundation, Inc
Schedule of appropriations and payments
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Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
		2012	2012	2012	2012	2012
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Kevin Price (joint with Kristal Bailey)</i> <i>"Teach Like it's 2013"</i> <i>North Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Kim Perry (joint with Alan LeRov)</i> <i>Total Body Fitness</i> <i>South Middle</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Kristal Bailey (joint with Kevin Price)</i> <i>"Teach Like its 3012"</i> <i>North Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Lisa Dunbar</i> <i>IPAD for Autism</i> <i>Clinton Elementary</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Heather Rollings</i> <i>"Food Labs"</i> <i>AR Rucker Middle</i> \$492 00 2013		\$0 00	\$492 00	\$0 00	\$492 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Nancy Vanairsdale (joint with Michelle Reece)</i> <i>"Apps to Increase Student Learning"</i> <i>North Elementary</i> \$498 00 2013		\$0 00	\$498 00	\$0 00	\$498 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Ashley Price (joint with Brett Blackmon)</i> <i>"Fitness Stations"</i> <i>AR Rucker Middle</i> \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Michelle Reece (joint with Nancy Vanairsdale)</i> <i>"Apps to Increase Student Learning"</i> <i>North Elementary</i> \$498 00 2013		\$0 00	\$498 00	\$0 00	\$498 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 <i>Erica Cureton</i> <i>"Look at What We Are Applying"</i> <i>North Elementary</i> \$484 00 2013		\$0 00	\$484 00	\$0 00	\$484 00	\$0 00

STATEMENT 11

J Marion Sims Foundation, Inc.
Schedule of appropriations and payments
December 31, 2012

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9/30/2012 thru 12/31/2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amended 2012	Amount Paid 2012	Ending Balance 2012
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 Ellenia Russell (joint with Chasity Robinson) "Seeing Things Differently" Kershaw Elementary \$499 00 2013		\$0 00	\$499 00	\$0 00	\$499 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 Chris Cuviallo (joint with Adam Wilson) "Reading Resources" Indian Land Middle \$495 00 2013		\$0 00	\$495 00	\$0 00	\$495 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 Brett Blackmon (joint with Ashlev Price) "Fitness Stations" AR Rucker Middle \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 Alan LeRoy (joint with Kim Perry) "Total Body Fitness" South Middle \$500 00 2013		\$0 00	\$500 00	\$0 00	\$500 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 Adam Wilson (joint with Chris Cuviallo) "Reading Resources" Indian Land Middle \$495 00 2013		\$0 00	\$495 00	\$0 00	\$495 00	\$0 00
Lancaster County School District 300 S Catawba Street Lancaster, SC 29720 Chasity Robinson (joint with Ellenia Russell) "Seeing Things Differently" Kershaw Elementary \$499 00 2013		\$0 00	\$499 00	\$0 00	\$499 00	\$0 00
Palmetto Citizens Against Sexual Assault 106 North York Street Lancaster, SC 29720 Children Advocacy Center Forensic Interviewer \$33,000 00 2012		\$33,000 00	\$0 00	\$0 00	\$0 00	\$33,000 00
York Technical College Foundation 452 South Anderson Road Rock Hill, SC 29730 ALC - York Technical College "Career Success Network (CSN) fka (BEST)" \$116,000 00 2010		\$14,500 00	\$0 00	\$0 00	\$0 00	\$14,500 00
		1,180,823	38,438	(34,439)	295,322	889,500
(less) Conditional Grants		(414,693)			-	(351,476)
Audit Adjustment		-			5,163	-
		766,130			300,485	538,024

J. Marion Sims Foundation, Inc.
EIN: 57-0355295
Form 990-PF
Tax Period: 2012 Ending 12/31/2012

Diversion of Assets:

For the period of September 15, 2009 to February 28, 2013, the Foundation's Vice-President for Finance and Administration, defrauded the Foundation of approximately \$422,148.

The Foundation has restated prior period Nets Assets by \$133,553 to reflect the fraud perpetrated for the period of September 15, 2009 through September 30, 2011. An additional \$288,595 was embezzled during the period of October 01, 2011 through February 28, 2013.

The Foundation has made a claim against its insurance regarding the loss of its investment assets. As of September 30, 2012, the Foundation has accrued a receivable from the insurance carrier for \$340,473 and recorded a loss of \$20,000 pertaining to the Foundation's insurance deductible. For the 3 month period ending December 31, 2012, the Foundation accrued a receivable from the insurance carrier of \$42,415. In 2013, an additional receivable of \$19,260 will be recognized, bringing the total insurance receivable to \$402,148.

The Foundation notified Law enforcement authorities immediately upon discovery of the unauthorized disbursements, and the Foundation immediately terminated the employment of the Vice President of Finance and Administration. At the time of this filing the authorities have arrested this individual.

**Power of Attorney
and Declaration of Representative**

► Type or print. ► See the separate instructions.

OMB No. 1545-0150

For IRS Use Only

Received by:

Name

Telephone

Function

Date / /

Part I Power of Attorney

Caution: A separate Form 2848 should be completed for each taxpayer. Form 2848 will not be honored for any purpose other than representation before the IRS.

1 Taxpayer Information. Taxpayer must sign and date this form on page 2, line 7.

Taxpayer name and address

J. MARION SIMS FOUNDATION, INC.
P.O. BOX 818
LANCASTER, SC 29721

Taxpayer identification number(s)

57-0355295

Daytime telephone number

(803) 286-8772

Plan number (if applicable)

hereby appoints the following representative(s) as attorney(s)-in-fact:

2 Representative(s) must sign and date this form on page 2, Part II.

Name and address

GREGORY W. HAYES
1960 SATELLITE BLVD, STE 3600
DULUTH, GA 30097

CAF No. 6505-61536R

PTIN P00054246

Telephone No. 770-995-8800

Fax No. 770-995-0601

Check if to be sent notices and communications ☐

Check if new: Address ☐ Telephone No. ☐ Fax No. ☐

Name and address

DAVID A. JOHNSON
1960 SATELLITE BLVD, STE 3600
DULUTH, GA 30097

CAF No. 6506-19843R

PTIN P00027893

Telephone No. 770-995-8800

Fax No. 770-995-0601

Check if to be sent notices and communications ☐

Check if new: Address ☐ Telephone No. ☐ Fax No. ☐

Name and address

CAF No.

PTIN

Telephone No.

Fax No.

Check if new: Address ☐ Telephone No. ☐ Fax No. ☐

to represent the taxpayer before the Internal Revenue Service for the following matters:

3 Matters

Description of Matter (Income, Employment, Payroll, Excise, Estate, Gift, Whistleblower, Practitioner Discipline, PLR, FOIA, Civil Penalty, etc.) (see instructions for line 3)	Tax Form Number (1040, 941, 720, etc.) (if applicable)	Year(s) or Period(s) (if applicable) (see instructions for line 3)
NET INVESTMENT INCOME EXCISE TAX	990-PF	2009/09-2013/09
NET INVESTMENT INCOME EXCISE TAX	990-PF	2012/12-2013/12

4 Specific use not recorded on Centralized Authorization File (CAF). If the power of attorney is for a specific use not recorded on CAF, check this box. See the instructions for Line 4. Specific Uses Not Recorded on CAF ☐

5 Acts authorized. Unless otherwise provided below, the representatives generally are authorized to receive and inspect confidential tax information and to perform any and all acts that I can perform with respect to the tax matters described on line 3, for example, the authority to sign any agreements, consents, or other documents. The representative(s), however, is (are) not authorized to receive or negotiate any amounts paid to the client in connection with this representation (including refunds by either electronic means or paper checks). Additionally, unless the appropriate box(es) below are checked, the representative(s) is (are) not authorized to execute a request for disclosure of tax returns or return information to a third party, substitute another representative or add additional representatives, or sign certain tax returns.

☐ Disclosure to third parties; ☐ Substitute or add representative(s); ☐ Signing a return;

☐ Other acts authorized: (see instructions for more information)

Exceptions. An unenrolled return preparer cannot sign any document for a taxpayer and may only represent taxpayers in limited situations. An enrolled actuary may only represent taxpayers to the extent provided in section 10.3(d) of Treasury Department Circular No. 230 (Circular 230). An enrolled retirement plan agent may only represent taxpayers to the extent provided in section 10.3(e) of Circular 230. A registered tax return preparer may only represent taxpayers to the extent provided in section 10.3(f) of Circular 230. See the line 5 instructions for restrictions on tax matters partners. In most cases, the student practitioner's (level k) authority is limited (for example, they may only practice under the supervision of another practitioner).

List any specific deletions to the acts otherwise authorized in this power of attorney:

- 6 Retention/revocation of prior power(s) of attorney. The filing of this power of attorney automatically revokes all earlier power(s) of attorney on file with the Internal Revenue Service for the same matters and years or periods covered by this document. If you do not want to revoke a prior power of attorney, check here ☐

YOU MUST ATTACH A COPY OF ANY POWER OF ATTORNEY YOU WANT TO REMAIN IN EFFECT

- 7 Signature of taxpayer. If a tax matter concerns a year in which a joint return was filed, the husband and wife must each file a separate power of attorney even if the same representative(s) is (are) being appointed. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, or trustee on behalf of the taxpayer, I certify that I have the authority to execute this form on behalf of the taxpayer.

► IF NOT SIGNED AND DATED, THIS POWER OF ATTORNEY WILL BE RETURNED TO THE TAXPAYER.

James T. Morton 5/14/13 PRESIDENT
Signature Date Title (if applicable)

JAMES T. MORTON 60704 J. MARION SIMS FOUNDATION, INC.
Print Name PIN Number Print name of taxpayer from line 1 if other than individual

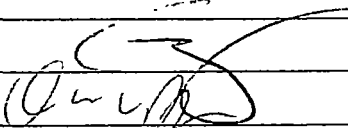
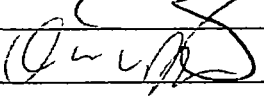
Part II Declaration of Representative

Under penalties of perjury, I declare that:

- I am not currently under suspension or disbarment from practice before the Internal Revenue Service;
- I am aware of regulations contained in Circular 230 (31 CFR, Part 10), as amended, concerning practice before the Internal Revenue Service;
- I am authorized to represent the taxpayer identified in Part I for the matter(s) specified there, and
- I am one of the following:
 - a Attorney - a member in good standing of the bar of the highest court of the jurisdiction shown below.
 - b Certified Public Accountant - duly qualified to practice as a certified public accountant in the jurisdiction shown below.
 - c Enrolled Agent - enrolled as an agent under the requirements of Circular 230.
 - d Officer - a bona fide officer of the taxpayer's organization
 - e Full-Time Employee - a full-time employee of the taxpayer.
 - f Family Member - a member of the taxpayer's immediate family (for example, spouse, parent, child, grandparent, grandchild, step-parent, step-child, brother, or sister).
 - g Enrolled Actuary - enrolled as an actuary by the Joint Board for the Enrollment of Actuaries under 29 U.S.C. 1242 (the authority to practice before the Internal Revenue Service is limited by section 10.3(d) of Circular 230).
 - h Unenrolled Return Preparer - Your authority to practice before the Internal Revenue Service is limited. You must have been eligible to sign the return under examination and have signed the return. See Notice 2011-6 and Special rules for registered tax return preparers and unenrolled return preparers in the instructions.
 - i Registered Tax Return Preparer - registered as a tax return preparer under the requirements of section 10.4 of Circular 230. Your authority to practice before the Internal Revenue Service is limited. You must have been eligible to sign the return under examination and have signed the return. See Notice 2011-6 and Special rules for registered tax return preparers and unenrolled return preparers in the instructions
 - k Student Attorney or CPA - receives permission to practice before the IRS by virtue of his/her status as a law, business, or accounting student working in LTC or STCP under section 10.7(d) of Circular 230. See instructions for Part II for additional information and requirements
 - r Enrolled Retirement Plan Agent - enrolled as a retirement plan agent under the requirements of Circular 230 (the authority to practice before the Internal Revenue Service is limited by section 10.3(e))

► IF THIS DECLARATION OF REPRESENTATIVE IS NOT SIGNED AND DATED, THE POWER OF ATTORNEY WILL BE RETURNED. REPRESENTATIVES MUST SIGN IN THE ORDER LISTED IN LINE 2 ABOVE. See the instructions for Part II.

Note: For designations d-i, enter your title, position, or relationship to the taxpayer in the "Licensing jurisdiction" column. See the instructions for Part II for more information.

Designation - Insert above letter (a-r)	Licensing jurisdiction (state) or other licensing authority (if applicable)	Bar, license, certification, registration, or enrollment number (if applicable). See instructions for Part II for more information.	Signature	Date
B	GA			5/15/13
B	GA			5/15/13

SHORT-YEAR RETURN, CHANGE OF ACCOUNTING PERIOD

Form **8868**
(Rev. January 2013)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete **Part II** unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file) - You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on **e-file for Charities & Nonprofits**.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	J. MARION SIMS FOUNDATION, INC.	57-0355295
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
File by the due date for filing your return. See instructions	P.O. BOX 818	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	LANCASTER, SC 29721	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
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

JAMES T. MORTON, PRESIDENT

- The books are in the care of ► P.O. BOX 818 - LANCASTER, SC 29721

Telephone No. ► (803) 286-8772

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2013**, to file the exempt organization return for the organization named above. The extension

is for the organization's return for:

► ☐ calendar year or

► ☒ tax year beginning **OCT 1, 2012**, and ending **DEC 31, 2012**

2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☒ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	49,700.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	49,700.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form 8868 (Rev. 1-2013)

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01-21-13