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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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





OMB No 1545-0052

2012

Open to Public Inspection

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

Name of foundation SCSYMMES FOUNDATION 485-2019001837		A Employer identification number 57-6017472	
Number and street (or P O box number if mail is not delivered to street address) 1525 W WT HARRIS BLVD D1114-044		B Telephone number (see instructions) (404) 238-0444	
City or town, state, and ZIP code CHARLOTTE, NC 28288		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		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) <input checked="" type="checkbox"/> \$ 13,999,531		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		(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 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.	348,365	348,365		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	299,131			
	b Gross sales price for all assets on line 6a _____ 1,131,944				
	7 Capital gain net income (from Part IV, line 2)		299,131		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	 5,157	6,463		
	12 Total. Add lines 1 through 11	652,653	653,959		
	13 Compensation of officers, directors, trustees, etc	93,144	56,515		36,629
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)				0
	b Accounting fees (attach schedule)	 2,000	0	0	2,000
	c Other professional fees (attach schedule)				0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	 31,413	5,987		0
	19 Depreciation (attach schedule) and depletion . . .	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings	3,072	0	0	3,072
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule)	 2	2		
	24 Total operating and administrative expenses. Add lines 13 through 23	129,631	62,504	0	41,701
	25 Contributions, gifts, grants paid	578,000			578,000
	26 Total expenses and disbursements. Add lines 24 and 25	707,631	62,504	0	619,701
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-54,978			
	b Net investment income (if negative, enter -0-)		591,455		
	c Adjusted net income (if negative, enter -0-)			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	71,322	32,417	32,417
	2	Savings and temporary cash investments	181,416	149,660	149,660
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ 83,133 Less allowance for doubtful accounts ▶ _____ 0		83,133	83,133
	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)	6,690,899	6,638,894	9,330,933
	c	Investments—corporate bonds (attach schedule).	3,974,588		
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	94,177	4,043,527	4,403,388
	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)	11,012,402	10,947,631	13,999,531	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	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 checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	11,012,402	10,947,631	
	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 (see page 17 of the instructions)	11,012,402	10,947,631	
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	11,012,402	10,947,631		

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	11,012,402
2	Enter amount from Part I, line 27a	2	-54,978
3	Other increases not included in line 2 (itemize) ▶ _____	3	10,435
4	Add lines 1, 2, and 3	4	10,967,859
5	Decreases not included in line 2 (itemize) ▶ _____	5	20,228
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	10,947,631

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(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 See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	299,131
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	628,218	13,522,947	0 046456
2010	656,599	12,873,316	0 051005
2009	516,590	11,345,445	0 045533
2008	726,483	13,083,150	0 055528
2007	840,723	15,410,915	0 054554

2	Total of line 1, column (d).	2	0 253076
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 050615
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	13,599,561
5	Multiply line 4 by line 3.	5	688,342
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	5,915
7	Add lines 5 and 6.	7	694,257
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	619,701

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here <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	11,829
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	0
3		Add lines 1 and 2.		3	11,829
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	11,829
6		Credits/Payments			
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	16,172	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	0	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	16,172
8		Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8	0
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	4,343
11		Enter the amount of line 10 to be Credited to 2013 estimated tax <input type="checkbox"/> 4,343	Refunded <input type="checkbox"/>	11	0

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	• By language in the governing instrument, or			
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) <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 .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of	WELLS FARGO BANK NA	Telephone no	(704) 383-5289
	Located at	401 S TRYON ST D1050-026 CHARLOTTE NC	ZIP +4	28202
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here			
	and enter the amount of tax-exempt interest received or accrued during the year	15		
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?		Yes	No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?		Yes	No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?		Yes	No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?		Yes	No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?		Yes	No
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).		Yes	No
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		No
	Organizations relying on a current notice regarding disaster assistance check here.			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?		Yes	No
	If "Yes," list the years	20		20
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
		20		20
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?		Yes	No
b	If "Yes," did it have excess business holdings in 2012 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?		5b	
	Organizations relying on a current notice regarding disaster assistance check here.	<input checked="" type="checkbox"/>		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	

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
Wells Fargo Bank	TRUSTEE	63,144		
1525 WEST WT HARRIS BLVD CHARLOTTE, NC 282881114	40			
Mr O Perry Earle III	Part time Trustee	10,000		
1405 Coachman Drive Fountain Inn, SC 29644	2			
Eleanor Welling	Part time Trustee	10,000		
PO Box 757 Cashiers, NC 28717	2			
F McKinnon Wilkinson	Part Time Trustee	10,000		
3465 Valley Vista Rd Walnut Creek, CA 94598	2			
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.				0

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.		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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	13,602,818
b	Average of monthly cash balances.	1b	203,843
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	13,806,661
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	13,806,661
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	207,100
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	13,599,561
6	Minimum investment return. Enter 5% of line 5.	6	679,978

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	679,978
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	11,829
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	11,829
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	668,149
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	668,149
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	668,149

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	619,701
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	619,701
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	619,701
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				668,149
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			40,876	
b Total for prior years 2010 , 20__ , 20__		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.				0
b From 2008.				0
c From 2009.				0
d From 2010.				0
e From 2011.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 619,701				
a Applied to 2011, but not more than line 2a			40,876	
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.				578,825
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				89,324
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. . . .				0
b Excess from 2009. . . .				0
c Excess from 2010. . . .				0
d Excess from 2011. . . .				0
e Excess from 2012. . . .				0

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

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

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

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a

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

WELLS FARGO PHILANTHROPIC SERVICES
1 W 4TH ST D4000-062
WINSTONSALEM, NC 27101
(888) 234-1999

b

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

APPLY ONLINE AT WWW.WELLSFARGO.COM/PRIVATEFOUNDATIONGRANTS/SYMMES FORM CAN ALSO BE OBTAINED BY ELECTRONIC MAIL BY FAXING THE REQUEST TO WELLS FARGO AT 888-234-1999 COMPLETED APPLICATION CANNOT BE FAXED

c

Any submission deadlines

MARCH 15TH ANNUALLY FOR MAY TRUSTEE MEETING SEPTEMBER 1ST FOR OCTOBER TRUSTEE MEETING

d

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

GRANTS MUST HAVE A MEASURABLE IMPACT WITHIN GREENVILLE COUNTY, SOUTH CAROLINA THE APPLICANT MUST BE A TAX-EXEMPT NON-PROFIT ENTITY WITH PROGRAMS AND SERVICES CONSISTENT WITH THE FOUNDATION'S MISSIONS

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	578,000
b Approved for future payment PEACE CENTER FOUNDATION 101 W BROAD STREET GREENVILLE, SC 29601	NONE	PUBLIC EXEMPT	CAPITAL CAMPAIGN - WATER	50,000
Total			3b	50,000

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities. . . .			14	348,365	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			18	299,131	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory. .					
11	Other revenue a MAIN & COLLEGE _____			1	5,157	
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e). .				652,653	
13	Total. Add line 12, columns (b), (d), and (e).					652,653

[illegible]

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

[illegible]

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign
Here**

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

*****	2013-04-20	*****	
Signature of officer or trustee	Date	Title	May the IRS discuss this return with the preparer shown below (see instr)? <input type="checkbox"/> Yes <input type="checkbox"/> No

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

**Paid
Preparer
Use Only**

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
Firm's name <input type="checkbox"/>			Firm's EIN <input type="checkbox"/>	
Firm's address <input type="checkbox"/>			Phone no	

TY 2012 Accounting Fees Schedule

Name: SCSYMMES FOUNDATION 485-2019001837

EIN: 57-6017472

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE (NON-ALLOC	2,000			2,000

TY 2012 Investments Corporate Bonds Schedule

Name: SCSYMMES FOUNDATION 485-2019001837

EIN: 57-6017472

Name of Bond	End of Year Book Value	End of Year Fair Market Value
464287226 ISHARES BARCLAYS		
693391104 PIMCO REAL RETURN		
693390700 PIMCO TOTAL RETURN		
693390882 PIMCO FOREIGN BOND		
239080401 DAVIS NEW YORK		
26203E851 DREYFUS/THE BOSTON		
38142Y401 GOLDMAN SACHS GROW		
464287614 ISHARES RUSSELL		
464287598 ISHARES RUSSELL		
46487630 ISHARES RUSSELL 2000		
74972H614 RS VALUE FUND CL		
77954Q106 T ROWE PRICE BLUE		
87234N849 TCW SMALL CAP GROW		
246248306 DELAWARE POOLED TR		
411511306 HARBOR INTERN.		
464287465 ISHARES MSCI EAFE		
922042858 VANGUARD EMERGING		
61744J617 MORGAN STANLEY		
722005667 PIMCO COMMODITY		
78464A607 SPDR DOW		
693390304 PIMCO LOW DURATION F		

TY 2012 Investments Corporate Stock Schedule

Name: SCSYMMES FOUNDATION 485-2019001837

EIN: 57-6017472

Name of Stock	End of Year Book Value	End of Year Fair Market Value
008882532 INVESCO INTL GROWTH-	550,000	569,038
314172560 FEDERATED STRAT VAL	778,509	863,280
38142Y401 GOLDMAN SACHS GRTH O	244,512	494,426
411511306 HARBOR INTERNATIONAL F	265,262	504,208
464287465 ISHARES MSCI EAFE	518,931	725,704
464287598 ISHARES RUSSELL 1000	509,865	994,430
464287614 ISHARES RUSSELL 1000	634,659	1,275,418
464287630 ISHARES RUSSELL 2000	433,239	670,151
61744J317 MORGAN STANLEY INS I	177,445	286,672
722005667 PIMCO COMMODITY REAL	399,577	343,954
77954Q106 T ROWE PRICE BLUE CH	883,021	1,052,831
78464A607 SPDR DOW JONES REIT	149,200	293,339
87234N849 TCW SMALL CAP GROWTH		
921946109 VANGUARD SELECTED VA		
922042858 VANGUARD MSCI EMERGI	463,857	600,799
464287473 ISHARES RUSSELL MIDC	471,403	493,608
464287648 ISHARES RUSSELL 2000	159,414	163,075

TY 2012 Investments - Other Schedule**Name:** SCSYMMES FOUNDATION 485-2019001837**EIN:** 57-6017472

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
7LP028746 MAIN & COLLEGE TRUST	AT COST	9,360	7,500
7MG0001R8 NORTH MAIN ST HOLDIN			
464287226 ISHARES CORE TOTAL U	AT COST	1,413,114	1,527,572
693390304 PIMCO LOW DURATION F	AT COST	164,400	166,299
693390700 PIMCO TOTAL RET FD-I	AT COST	1,463,058	1,580,801
693390882 PIMCO FOREIGN BD FD	AT COST	517,197	550,740
693391104 PIMCO REAL RETURN FU	AT COST	476,398	570,476

TY 2012 Other Decreases Schedule

Name: SCSYMMES FOUNDATION 485-2019001837

EIN: 57-6017472

Description	Amount
MUTUAL FUND TAX EFFECTIVE DATE AFTER TYE	11,288
REVERSAL POSTING AFTER TYE	8,939
ROUNDING	1

TY 2012 Other Expenses Schedule

Name: SCSYMMES FOUNDATION 485-2019001837

EIN: 57-6017472

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADR FEES	2	2		0

TY 2012 Other Income Schedule

Name: SCSYMMES FOUNDATION 485-2019001837

EIN: 57-6017472

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MAIN & COLLEGE K-1	5,157	6,463	

TY 2012 Other Increases Schedule

Name: SCSYMMES FOUNDATION 485-2019001837

EIN: 57-6017472

Description	Amount
MUTUAL FUND TAX EFFECTIVE DATE BEFORE TYE	10,435

TY 2012 Taxes Schedule

Name: SCSYMMES FOUNDATION 485-2019001837

EIN: 57-6017472

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
		0		0
		0		0
FOREIGN TAXES ON QUALIFIED FOR	3,858	3,858		0
FOREIGN TAXES ON NONQUALIFIED	2,129	2,129		0

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
32553 606 FEDERATED STRAT VAL DIV FD IS #662		2011-09-26	2012-07-30
2413 ISHARES RUSSELL 1000 VALUE		2009-03-12	2012-07-30
345 ISHARES RUSSELL 1000 VALUE		2009-03-12	2012-11-01
340 ISHARES RUSSELL 2000 VALUE INDEX FUND		2011-09-14	2012-11-01
5807 201 TCW GALILEO FDS INC SMALL CAP GROWTH FD		2010-03-30	2012-08-28
23149 916 VANGUARD WHITEHALL FDS INC SELECTED VALU		2011-09-14	2012-08-28

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
167,000		146,491	20,509
166,904		90,092	76,812
25,029		12,881	12,148
25,068		21,049	4,019
159,524		150,000	9,524
471,332		412,300	59,032


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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			20,509
			76,812
			12,148
			4,019
			9,524
			59,032

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MICHAELS WAY INC PO BOX 6543 GREENVILLE,SC 29606	NONE	PULIC EXEMPT	CONTINUING EDUCATION	10,000
GREENVILLE FORWARD 24 CLEVELAND STREET GREENVILLE,SC 29601	NONE	PUBLIC EXEMPT	GARDENING FOR GOOD	24,000
FACES AND VOICES OF RECOVERY GREENVILLE PO BOX 9836 GREENVILLE,SC 29604	NONE	PUBLIC EXEMPT	CAPITAL CAMPAIGN	50,000
GENESIS HOMES 2131 WOODRUFF ROAD GREENVILLE,SC 29607	NONE	PUBLIC EXEMPT	CONSTRUCTION OF ANNIE'S	20,000
SURGEONS FOR SIGHT 113 DOCTORS DRIVE GREENVILLE,SC 29605	NONE	PUBLIC EXEMPT	GIVING TO SIGHT TO NEEDY	5,000
GENEROUS GARDEN PROJECT 161 VERDIN ROAD GREENVILLE,SC 29607	NONE	PUBLIC EXEMPT	2013 START UP	20,000
NORTH GREENVILLE UNIVERSITY PO BOX 1892 TIGERVILLE,SC 29688	NONE	PUBLIC EXEMPT	CRAIN SCIENCE BUILDING	50,000
YMCA OF GREENVILLE 723 CLEVELAND STREET GREENVILLE,SC 29601	NONE	PUBLIC EXEMPT	FW SYMMES CHAPEL	50,000
MUSEUM ASSOCIATION INC 420 COLLEGE ST GREENVILLE,SC 29601	NONE	PUBLIC EXEMPT	CERAMIC VESSELS FUNDING	32,000
BOYS HOME OF THE SOUTH 10612 AUGUSTA ROAD BELTON,SC 29627	NONE	PUBLIC EXEMPT	HAYES COTTAGE RENOVATION	20,000
GREENVILLE SYMPHONY ORCHESTRA 200 SOUTH MAIN STREET GREENVILLE,SC 29601	NONE	PUBLIC EXEMPT	COMMUNITY ENGAGEMENT	50,000
CANCER SOCIETY OF GREENVILLE COUNTY 113 MILLS AVENUE GREENVILLE,SC 29605	NONE	PUBLIC EXEMPT	MEDICATION COSTS	10,000
PENDLETON HISTORIC FOUNDATION PO BOX 444 PENDLETON,SC 29760	NONE	PUBLIC EXEMPT	ASHTABULA RESTORATION AND	12,000
MEALS ON WHEELS OF GREENVILLE INC 15 OREGON STREET GREENVILLE,SC 29605	NONE	PUBLIC EXEMPT	SPECIALTY MEALS	10,000
WAREHOUSE THEATER 37 AUGUSTA STREET GREENVILLE,SC 29601	NONE	PUBLIC EXEMPT	THIS WOODEN O	10,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
WALKER FOUNDATION 355 CEDAR SPRINGS ROAD SPARTANBURG, SC 29302	NONE	PUBLIC EXEMPT	RESTROOM AND LOCKER	20,000
GATEWAY HOUSE INC PO BOX 4241 GREENVILLE, SC 29609	NONE	PUBLIC EXEMPT	THE EDUCATION PORTAL	10,000
GREENVILLE FAMILY PARTNERSHIP PO BOX 10203 GREENVILLE, SC 29603	NONE	PUBLIC EXEMPT	HOLISTIC OUTREACH PROGRAMS	20,000
PEACE CENTER FOUNDATION 101 WBROAD STREET GREENVILLE, SC 29650	NONE	PUBLIC EXEMPT	PEACE CENTER RENOVATION	50,000
CAMPERDOWN ACADEMY 501 HOWELL ROAD GREENVILLE, SC 29615	NONE	PUBLIC EXEMPT	SCHOLARSHIP PROGRAM	15,000
HABITAT FOR HUMANITY OF GREENVILLE COUNTY PO BOX 1206 GREENVILLE, SC 29602	NONE	PUBLIC EXEMPT	WOMEN BUILD	20,000
SOUTH CAROLINA CHILDREN'S THEATRE PO BOX 9340 GREENVILLE, SC 29604	NONE	PUBLIC EXEMPT	KNOW WAY	5,000
SOUTH CAROLINA GOVERNOR'S SCHOOL FOR SCIENCE AND MATHEMATICS 1201 MAIN STREET COLUMBIA, SC 29201	NONE	PUBLIC EXEMPT	MIDDLE SCHOOL PROGRAMS	10,000
CHILD'S HAVEN 1124 RUTHERFORD ROAD GREENVILLE, SC 29609	NONE	PUBLIC EXEMPT	NEW BUS	20,000
UPSTATE HOMELESS COALITION OF SOUTH CAROLINA 150 EXECUTIVE CTNR DR B3211 GREENVILLE, SC 29615	NONE	PUBLIC EXEMPT	HOUSING DEVELOPMENT FUND	20,000
SOUTH CAROLINA SOCIETY FOR THE PREVENTION OF CRUELTY TO ANIMALS 305 AIRPORT ROAD GREENVILLE, SC 29607	NONE	PUBLIC EXEMPT	CONNECTING ANIMALS AND	15,000
Total  3a				578,000