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

2012Department of the Treasury
Internal Revenue Service

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

Open to public inspection

For calendar year 2012 or tax year beginning

, and ending

Name of foundation PIEDMONT CHARITABLE FOUNDATION, INC.		A Employer identification number 58-6035073
Number and street (or P.O. box number if mail is not delivered to street address) SEVEN PIEDMONT CENTER, SUITE 140	Room/suite	B Telephone number 404-816-5205
City or town, state, and ZIP code ATLANTA, GA 30305		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 4,920,338.	J Accounting method: ☐ Cash ☐ Accrual ☒ Other (specify) MODIFIED CASH (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		128.	128.		STATEMENT 1
4 Dividends and interest from securities		105,369.	105,369.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		314,700.			
b Gross sales price for all assets on line 6a		1,640,627.			
7 Capital gain net income (from Part IV, line 2)			314,700.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		41.	41.		STATEMENT 3
12 Total. Add lines 1 through 11		420,238.	420,238.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		5,029.	0.		5,029.
c Other professional fees STMT 5		44,356.	32,019.		12,337.
17 Interest					
18 Taxes STMT 6		13,374.	301.		0.
19 Depreciation and depletion					
20 Occupancy		4,694.	0.		4,694.
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		2,636.	0.		2,636.
24 Total operating and administrative expenses. Add lines 13 through 23		70,089.	32,320.		24,696.
25 Contributions, gifts, grants paid		205,000.			205,000.
26 Total expenses and disbursements. Add lines 24 and 25		275,089.	32,320.		229,696.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		145,149.			
b Net investment income (if negative, enter -0-)			387,918.		
c Adjusted net income (if negative, enter -0-)				N/A	

918-20

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SCANNED AUG 15 2013

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			-1.	-1.
	2	Savings and temporary cash investments		317,594.	354,683.	354,683.
	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				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations \$TMT 9		146,167.	209,200.	217,148.
	b	Investments - corporate stock \$TMT 10		2,876,980.	3,110,510.	3,603,042.
	c	Investments - corporate bonds \$TMT 11		392,007.	405,273.	425,087.
11	Investments - land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other \$TMT 12		522,938.	306,753.	320,379.	
14	Land, buildings, and equipment: basis ▶					
	Less accumulated depreciation ▶					
15	Other assets (describe ▶ PREPAID TAXES)		465.	0.	0.	
16	Total assets (to be completed by all filers)		4,256,151.	4,386,418.	4,920,338.	
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				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)		0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐					
	and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☒					
	and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
29	Retained earnings, accumulated income, endowment, or other funds		4,256,151.	4,386,418.		
30	Total net assets or fund balances		4,256,151.	4,386,418.		
31	Total liabilities and net assets/fund balances		4,256,151.	4,386,418.		

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	4,256,151.
2	Enter amount from Part I, line 27a	2	145,149.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	4,401,300.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	14,882.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,386,418.

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	CHARLES SCHWAB		VARIOUS	12/31/12
b	CHARLES SCHWAB		VARIOUS	12/31/12
c	MERRILL LYNCH		VARIOUS	12/31/12
d	MERRILL LYNCH		VARIOUS	12/31/12
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 435,397.		367,403.	67,994.
b 1,195,779.		958,524.	237,255.
c 4,268.			4,268.
d 5,183.			5,183.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			67,994.
b			237,255.
c			4,268.
d			5,183.
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	314,700.
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	219,412.	4,704,193.	.046642
2010	202,617.	4,551,430.	.044517
2009	246,972.	4,093,317.	.060335
2008	268,537.	5,016,506.	.053531
2007	226,833.	5,568,828.	.040733

2 Total of line 1, column (d)	2	.245758
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	.049152
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	4,935,482.
5 Multiply line 4 by line 3	5	242,589.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,879.
7 Add lines 5 and 6	7	246,468.
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	229,696.

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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	7,758.
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	7,758.
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	7,758.
6 Credits/Payments:			
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	9,000.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	9,000.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	30.	
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	1,212.	
11 Enter the amount of line 10 to be: Credited to 2013 estimated tax ☐ 1,212. Refunded ☐	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
1b 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. ☐ \$ 0. (2) On foundation managers. ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		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) ☐ <u>GA</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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

N/A

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? Website address ► N/A	13		
14	The books are in care of ► PIEDMONT CHARITABLE FOUNDATION Telephone no. ► 404-816-5205 Located at ► 7 PIEDMONT CENTER, SUITE 140, ATLANTA, GA ZIP+4 ► 30305			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A ► ☐	1b	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ Yes ☒ No If "Yes," list the years ► _____, _____, _____ 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. ► _____, _____, _____	2b	
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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b	X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ 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

5b

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?

6b

X

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

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.

(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
R. LEE ROBINSON	SECRETARY/TREAS			
7 PIEDMONT CENTER, SUITE 140				
ATLANTA, GA 30305	0.00	0.	0.	0.
MARGARET R. BUKER	PRESIDENT			
7 PIEDMONT CENTER, SUITE 140				
ATLANTA, GA 30305	0.00	0.	0.	0.
ELIZABETH S. ROBINSON	VICE PRESIDENT			
7 PIEDMONT CENTER, SUITE 140				
ATLANTA, GA 30305	0.00	0.	0.	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

Form 990-PF (2012)

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	4,684,517.
b Average of monthly cash balances	1b	326,125.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	5,010,642.
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	5,010,642.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	75,160.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,935,482.
6 Minimum investment return. Enter 5% of line 5	6	246,774.

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	246,774.
2a Tax on investment income for 2012 from Part VI, line 5	2a	7,758.
b Income tax for 2012. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	7,758.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	239,016.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	239,016.
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	239,016.

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	229,696.
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	
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	229,696.
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	229,696.

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				239,016.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			204,858.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2012 from Part XII, line 4: ▶ \$ 229,696.				
a Applied to 2011, but not more than line 2a			204,858.	
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				24,838.
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 instr.			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				214,178.
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	0.			
10 Analysis of line 9:				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				
e Excess from 2012				

Part 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				
ALEXANDER-THARPE FUND 150 BOBBY DODD WAY ATLANTA, GA 30332	NONE	PUBLIC	EDUCATION	1,000.
ATLANTA MISSION PO BOX 1807 ATLANTA, GA 30301	NONE	PUBLIC	HUMAN SERVICES	5,000.
BAYLOR SCHOOL 171 BAYLOR SCHOOL ROAD CHATTANOOGA, TN 37405	NONE	SCHOOL	EDUCATION	1,000.
BOY SCOUTS OF AMERICA, ATL AREA COUNCIL 1800 CIRCLE 75 PARKWAY ATLANTA, GA 30339	NONE	PUBLIC	YOUTH DEVELOPMENT	18,000.
BOYS AND GIRLS CLUB OF METRO ATLANTA 100 EDGEWOOD AVE, NE SUITE 700 ATLANTA, GA 30303	NONE	PUBLIC	YOUTH DEVELOPMENT	5,000.
Total	SEE CONTINUATION SHEET(S)			3a 205,000.
b Approved for future payment				
NONE				
Total			3b	0.

Part XV Supplementary Information
3 Grants and Contributions Paid During the Year (Continuation)

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
CARE AND COUNSELING CENTER OF GEORGIA 1814 CLAIRMONT ROAD DECATUR, GA 30033	NONE	PUBLIC	HEALTHCARE	10,000.
CHILDREN'S HEALTHCARE OF ATLANTA 1687 TULLIE CIRCLE ATLANTA, GA 30329	NONE	PUBLIC	HEALTHCARE	10,000.
EMORY UNIVERSITY 201 DOWMAN DRIVE ATLANTA, GA 30322	NONE	UNIV.	EDUCATION	7,500.
EMORY UNIVERSITY HOSPITAL 550 PEACHTREE STREET, NE ATLANTA, GA 30308	NONE	UNIV.	HEALTHCARE	7,500.
EMORY UNIVERSITY SCHOOL THEOLOGY 1531 DICKEY DRIVE ATLANTA, GA 30322	NONE	UNIV.	EDUCATION	7,500.
FAMILIES FIRST 1105 WEST PEACHTREE STREET ATLANTA, GA 30357	NONE	PUBLIC	HUMAN SERVICES	2,000.
FLORIDA STATE UNIV COLLEGE OF LAW 425 W. JEFFERSON ST. TALLAHASSEE, FL 32306	NONE	UNIV.	EDUCATION	2,000.
FOUNDATION OF WESLEY WOODS, INC. 1817 CLIFTON ROAD ATLANTA, GA 30329	NONE	PUBLIC	HEALTHCARE	5,000.
LITERACY ACTION 41 MARIETTA STREET ATLANTA, GA 30303	NONE	PUBLIC	EDUCATION & HUMAN SERVICES	10,000.
MADISON MORGAN CULTURAL CENTER 434 SOUTH MAIN STREET MADISON, GA 30650	NONE	PUBLIC	ARTS & CULTURE	5,000.
Total from continuation sheets				175,000.

Part XV Supplementary Information
3 Grants and Contributions Paid During the Year (Continuation)

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
MARCH OF DIMES GEORGIA CHAPTER 1776 PEACHTREE STREET ATLANTA, GA 30909	NONE	PUBLIC	HUMAN SERVICES	5,000.
MERIDIAN HERALD 542 OAKDALE ROAD ATLANTA, GA 30307	NONE	CHURCH	RELIGIOUS PROMOTION	3,000.
OUR LADY OF PERPETUAL HELP HOME 760 WASHINGTON STREET SOUTHWEST ATLANTA, GA 30315	NONE	PUBLIC	HEALTHCARE	20,000.
RECORDING FOR THE BLIND & DYSLEXIC 20 ROSZEL ROAD PRINCETON, NJ 08540	NONE	PUBLIC	EDUCATION	1,000.
SMART GROWTH NEWTON COUNTY PO BOX 2309 COVINGTON, GA 30015	NONE	PUBLIC	COMMUNITY IMPROVEMENT	2,000.
ST. SIMONS LAND TRUST P.O. BOX 24615 ST. SIMONS ISLAND, GA 31522	NONE	PUBLIC	ENVIRONMENT	5,000.
STANFORD UNIVERSITY ATHLETIC DEPT 341 GALVEZ STREET STANFORD, CA 94305	NONE	UNIV.	ATHLETICS	1,000.
STURDIVANT MUSEUM ASSOCIATION 713 MABRY STREET SELMA, AL 36701	NONE	PUBLIC	ARTS AND CULTURE	5,000.
TAMPA BAY HISTORY CENTER 225 S FRANKLIN ST TAMPA, FL 33602	NONE	PUBLIC	ARTS & CULTURE	2,500.
THE CHEWONKI FOUNDATION 485 CHEWONKI NECK WISCASSET, ME 04578	NONE	PUBLIC	YOUTH DEVELOPMENT	1,500.
Total from continuation sheets				

Part XV Supplementary Information
3 Grants and Contributions Paid During the Year (Continuation)

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
THE CRADDOCK CENTER P.O. BOX 69 CHERRY LOG, GA 30522	NONE	PUBLIC	COMMUNITY IMPROVEMENT	5,000.
THE SALVATION ARMY P.O. BOX 931148 NORCROSS, GA 30003	NONE	PUBLIC	HUMAN SERVICES	5,000.
THE SCHENCK SCHOOL 282 MT. PARAN ROAD ATLANTA, GA 30327	NONE	SCHOOL	EDUCATION	2,500.
THE WESTMINSTER SCHOOLS 1424 WEST PACES FERRY ROAD ATLANTA, GA 30327	NONE	SCHOOL	EDUCATION	5,000.
TOAST OF TAMPA SHOW CHORUS P.O. BOX 20165 TAMPA, FL 33622	NONE	PUBLIC	ARTS & CULTURE	5,000.
WASHINGTON & LEE UNIVERSITY 204 WEST WASHINGTON STREET LEXINGTON, VA 24450	NONE	UNIV.	EDUCATION	5,000.
WOODRUFF ARTS CENTER 1280 PEACHTREE STREET ATLANTA, GA 30309	NONE	PUBLIC	ARTS & CULTURE	17,500.
ACTION MINISTRIES 17 EXECUTIVE PARK DRIVE NORTHEAST ATLANTA, GA 30329	NONE	PUBLIC	HEALTH	5,000.
BREAKTHRU HOUSE 3180 PEACHTREE ROAD NW ATLANTA, GA 30305	NONE	PUBLIC	HUMAN SERVICES	5,000.
CANTERBURY COURT 3750 PEACHTREE ROAD NORTHEAST ATLANTA, GA 30319	NONE	PUBLIC	HUMAN SERVICES	5,000.
Total from continuation sheets				

3 Grants and Contributions Paid During the Year (Continuation)Total from continuation sheets

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
CHARLES SCHWAB 4333	26.
INTERNAL REVENUE SERVICE	18.
MERRILL LYNCH 6538	84.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	128.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CHARLES SCHWAB 4333	96,287.	0.	96,287.
ENDOWMENT FUND K1	3,859.	0.	3,859.
MERRILL LYNCH 6538	5,223.	0.	5,223.
TOTAL TO FM 990-PF, PART I, LN 4	105,369.	0.	105,369.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MISC DEPOSIT	39.	39.	
ENDOWMENT FUND K1	2.	2.	
TOTAL TO FORM 990-PF, PART I, LINE 11	41.	41.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	5,029.	0.		5,029.
TO FORM 990-PF, PG 1, LN 16B	5,029.	0.		5,029.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BOOKKEEPING	12,337.	0.		12,337.
INVESTMENT EXPENSE	31,239.	31,239.		0.
ENDOWMENT FUND K1	780.	780.		0.
TO FORM 990-PF, PG 1, LN 16C	44,356.	32,019.		12,337.

FORM 990-PF	TAXES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	12,608.	0.		0.
FOREIGN TAX	301.	301.		0.
TAX EXPENSE	465.	0.		0.
TO FORM 990-PF, PG 1, LN 18	13,374.	301.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES & SUBSCRIPTIONS	500.	0.		500.
REGISTRATION FEES	50.	0.		50.
SUPPLIES	400.	0.		400.
TELEPHONE	1,186.	0.		1,186.
INSURANCE	500.	0.		500.
TO FORM 990-PF, PG 1, LN 23	2,636.	0.		2,636.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
DESCRIPTION		AMOUNT	
NET ASSET ADJUSTMENT		12,722.	
UNREALIZED GAIN/LOSS FROM PASSTHROUGH		2,160.	
TOTAL TO FORM 990-PF, PART III, LINE 5		14,882.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	9
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
CHARLES SCHWAB 4333	X		209,200.	217,148.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			209,200.	217,148.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS					
TOTAL TO FORM 990-PF, PART II, LINE 10A			209,200.	217,148.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	10
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB 4333		3,110,510.	3,603,042.
TOTAL TO FORM 990-PF, PART II, LINE 10B		3,110,510.	3,603,042.

FORM 990-PF	CORPORATE BONDS	STATEMENT	11
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB 4333		405,273.	425,087.
TOTAL TO FORM 990-PF, PART II, LINE 10C		405,273.	425,087.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 12
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MERRILL LYNCH 6538	COST	233,090.	246,716.
ENDOWMENT FUND	COST	73,663.	73,663.
TOTAL TO FORM 990-PF, PART II, LINE 13		306,753.	320,379.

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 File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. PIEDMONT CHARITABLE FOUNDATION, INC.	Employer identification number (EIN) or 58-6035073
	Number, street, and room or suite no. If a P.O. box, see instructions. SEVEN PIEDMONT CENTER, SUITE 140	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. ATLANTA, GA 30305	

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

PIEDMONT CHARITABLE FOUNDATION

- The books are in the care of ► **7 PIEDMONT CENTER, SUITE 140 - ATLANTA, GA 30305**

Telephone No ► **404-816-5205**

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 **2012** or
 ► ☐ tax year beginning _____, and ending _____.

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	\$ 7,697.
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	\$ 9,000.
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	\$ 0.

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)