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

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

2012

Open to public inspection

For calendar year 2012 or tax year beginning

, and ending

Name of foundation TUCKER FOUNDATION		A Employer identification number 62-1603398
Number and street (or P O box number if mail is not delivered to street address) 600 KRYSTAL BUILDING		B Telephone number 423-756-1202
City or town, state, and ZIP code CHATTANOOGA, TN 37402		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <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) \$ 27,908,308.	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 III 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	18,096.	17,824.		STATEMENT 1
	4 Dividends and interest from securities	501,183.	501,183.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,200,276.			
	b Gross sales price for all assets on line 6a	2,596,760.			
	7 Capital gain net income (from Part IV, line 2)		1,200,276.		
	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	-11,375.	-11,375.		STATEMENT 3	
12 Total. Add lines 1 through 11	1,708,180.	1,707,908.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	116,920.	58,460.		58,460.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees STMT 4	2,875.	1,437.		1,438.
	17 Interest				
	18 Taxes STMT 5	203,695.	10,171.		4,442.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	308.	154.		154.
	22 Printing and publications				
	23 Other expenses STMT 6	158,350.	89,929.		68,421.
	24 Total operating and administrative expenses. Add lines 13 through 23	482,148.	160,151.		132,915.
	25 Contributions, gifts, grants paid	2,118,730.			1,201,230.
26 Total expenses and disbursements. Add lines 24 and 25	2,600,878.	160,151.		1,334,145.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-892,698.				
b Net investment income (if negative, enter -0-)		1,547,757.			
c Adjusted net income (if negative, enter -0-)			N/A		

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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		2,452,260.	748,798.	748,798.		
	2 Savings and temporary cash investments						
	3 Accounts receivable ▶						
	Less: allowance for doubtful accounts ▶						
	4 Pledges receivable ▶						
	Less: allowance for doubtful accounts ▶						
	5 Grants receivable						
	6 Receivables due from officers, directors, trustees, and other disqualified persons						
	7 Other notes and loans receivable ▶ 1,300,000.						
	Less: allowance for doubtful accounts ▶ 0.		900,000.	1,300,000.	1,300,000.		
	8 Inventories for sale or use						
	9 Prepaid expenses and deferred charges						
	10a Investments - U.S. and state government obligations						
	b Investments - corporate stock STMT 7		8,297,230.	7,176,633.	11,826,120.		
	c Investments - corporate bonds						
Liabilities	11 Investments - land, buildings, and equipment basis ▶						
	Less accumulated depreciation ▶						
	12 Investments - mortgage loans						
	13 Investments - other STMT 8		11,919,413.	14,033,390.	14,033,390.		
	14 Land, buildings, and equipment: basis ▶						
	Less accumulated depreciation ▶						
	15 Other assets (describe ▶)						
	16 Total assets (to be completed by all filers)		23,568,903.	23,258,821.	27,908,308.		
	17 Accounts payable and accrued expenses						
	18 Grants payable			917,500.			
Net Assets or Fund Balances	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.	917,500.			
	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24 Unrestricted		23,568,903.	22,341,321.			
	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		23,568,903.	22,341,321.			
	31 Total liabilities and net assets/fund balances		23,568,903.	23,258,821.			

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	23,568,903.
2 Enter amount from Part I, line 27a	2	-892,698.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	22,676,205.
5 Decreases not included in line 2 (itemize) ▶ UNREALIZED DEPRECIATION	5	334,884.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	22,341,321.

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			
b SEE ATTACHED STATEMENTS			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 2,596,760.		1,396,484.	1,200,276.

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			
b			
c			
d			
e			1,200,276.

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	1,200,276.
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	950,645.	26,687,643.	.035621
2010	739,915.	20,091,255.	.036828
2009	807,695.	13,359,098.	.060460
2008	898,326.	14,869,154.	.060415
2007	1,081,495.	21,031,101.	.051424

2 Total of line 1, column (d)	2	.244748
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	.048950
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	26,639,986.
5 Multiply line 4 by line 3	5	1,304,027.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	15,478.
7 Add lines 5 and 6	7	1,319,505.
8 Enter qualifying distributions from Part XII, line 4	8	1,334,145.

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.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1 15,478.
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 15,478.
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 15,478.
6 Credits/Payments:		
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a 94,880.	
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 94,880.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		8
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10 79,402.
11 Enter the amount of line 10 to be: Credited to 2013 estimated tax 15,480. Refunded		11 63,922.

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. \$ 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) NONE		
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		X
14	The books are in care of ► PAM CUZZORT Located at ► 600 KRYSTAL BUIDLING, CHATTANOOGA, TN Telephone no. ► 423-756-1202 ZIP+4 ► 37402			
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? 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? 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	2b	
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	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

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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.

☐ Yes ☒ No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

N/A

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

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		116,920.	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

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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	25,883,385.
b	Average of monthly cash balances	1b	1,162,286.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	27,045,671.
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	27,045,671.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	405,685.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	26,639,986.
6	Minimum investment return. Enter 5% of line 5	6	1,331,999.

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	1,331,999.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	15,478.
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	15,478.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,316,521.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,316,521.
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	1,316,521.

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	1,334,145.
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	1,334,145.
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	15,478.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,318,667.

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				1,316,521.
2 Undistributed income, if any, as of the end of 2012			0.	
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	5,727.			
c From 2009	144,860.			
d From 2010				
e From 2011				
f Total of lines 3a through e	150,587.			
4 Qualifying distributions for 2012 from Part XII, line 4: ► \$ 1,334,145.			0.	
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				1,316,521.
e Remaining amount distributed out of corpus	17,624.			
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:	168,211.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	168,211.			
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	168,211.			
10 Analysis of line 9:				
a Excess from 2008	5,727.			
b Excess from 2009	144,860.			
c Excess from 2010				
d Excess from 2011				
e Excess from 2012	17,624.			

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				
VARIOUS, SCH. ATTACHED				1,201,230.
Total			3a	1,201,230.
b Approved for future payment				
VARIOUS, SCH. ATTACHED				917,500.
Total			3b	917,500.

TUCKER FOUNDATION

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	COCA-COLA ENTERPRISES INC NEW	D	01/01/03	03/09/12
b	COCA-COLA ENTERPRISES INC NEW	D	01/01/03	06/05/12
c	COCA-COLA ENTERPRISES INC NEW	D	01/01/03	10/24/12
d	ECOLAB INC COM	P	08/10/11	05/15/12
e	DIAGEO PLC SPONS ADR	P	03/22/11	07/18/12
f	SYSCO CORP COM	P	12/09/10	07/18/12
g	PAYCHEX INC COM	P	03/01/11	07/18/12
h	MCDONALDS CORP COM	P	12/31/10	07/18/12
i	WATERS CORP COM	P	12/28/10	09/04/12
j	GENERAL MILLS INC COM	P	03/22/11	09/21/12
k	NESTLE SA SPONS ADR	P	04/27/11	10/02/12
l	STRYKER CORP COM	P	06/21/11	10/02/12
m	SUNTRUST - SEE ATTACHED	P	VARIOUS	
n	SUNTRUST - SEE ATTACHED	P	VARIOUS	
o	FROM K-1 ACL ALTERNATE FUND	P	VARIOUS	

(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 191,692.			191,692.
b 330,191.			330,191.
c 497,345.			497,345.
d 64,149.		45,949.	18,200.
e 52,727.		36,545.	16,182.
f 29,002.		29,270.	-268.
g 43,242.		43,235.	7.
h 46,012.		38,325.	7,687.
i 43,994.		43,183.	811.
j 32,181.		29,512.	2,669.
k 25,563.		21,141.	4,422.
l 16,375.		15,488.	887.
m 544,831.		501,370.	43,461.
n 550,092.		570,866.	-20,774.
o		8,640.	-8,640.

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			191,692.
b			330,191.
c			497,345.
d			18,200.
e			16,182.
f			-268.
g			7.
h			7,687.
i			811.
j			2,669.
k			4,422.
l			887.
m			43,461.
n			-20,774.
o			-8,640.

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 }

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

2

3

Recipient	Purpose of Grant	Amount
Alliance for the Cumberlands Cookeville, TN	General Use	5,000
American Chestnut Foundation at UTC Chattanooga, TN	General Use	5,000
Association of Visual Arts Chattanooga, TN	General Use	5,000
Atlanta Steeplechase Atlanta, GA	General Use	1,500
Baylor School Chattanooga, TN	General Use	100,002
Boy Scouts of America -Cherokee Council Chattanooga, TN	General Use	13,000
Bradley Initiative for Church and Community Cleveland, TN	General Use	57,018
Bonefish & Tarpon Trust Key Largo, FL	General Use	1,000
Booth Western Art Museum Cartersville, GA	General Use	5,003
Boys & Girls Club of Cleveland TN Cleveland, TN	Be Successful Program	5,000
Bright School Chattanooga, TN	General Use	40,000
Brightstone Franklin, TN	General Use	1,000
Buffalo Bill Historical Museum Cody, WY	Internship Program	5,003
C5 Youth Foundation Atlanta, GA	Summer Camps	20,000
Chattanooga Arboretum & Nature Center Chattanooga, TN	General Use	200
Chattanooga Community Kitchen Chattanooga, TN	General Use	500
Chattanooga State Community College Foundation Chattanooga, TN	General Use	24,988
Chattanooga Symphony & Opera Chattanooga, TN	Educational OutReach	25,000
Chattanooga Woodworking Chattanooga, TN	Scholarship	10,000
Cleveland Fraternal Order of Police Cleveland, TN	General Use	500
Cleveland State Community College Cleveland, TN	Workforce related education	35,000
Colorado State University Polo Colorado Springs, CO	General Use	5,000
Community Foundation of Chattanooga Chattanooga, TN	Donor Advised Fund: Tucker Fund	290,003
Daisy Elementary Soddy Daisy, TN	School Library Book Expansion	500
Ducks Unlimited Memphis, TN	Preserve North American Boreal Forest Eco System	25,000
Fellowship of Christian Athletes Chattanooga, TN	General Use	500
Friends of Chickamauga National Military Park Chattanooga, TN	General Use	5,003
Friends of the 6th Cavalry Museum Ft Oglethorpe, GA	General Use	15,000
Georgia Conservancy Atlanta, GA	Land Conservation	10,007
Grayson Jockey Club Research Foundation Lexington, KY	General Use	10,000
Groton School Annual Fund Groton, Massachusetts	General Use	5,000
Habitat for Humanity Chattanooga, TN	General Use	3,014
High Hope Steeplechase Foundation	General Use	10,000

Lexington, KY	Scholarship for Equine Science	24,988
Hiwassee College		
Hiwassee, TN		
Hospice of Chattanooga	Emergency Generator	15,000
Chattanooga, TN		
Hunter Museum of Art	General Use	2,500
Chattanooga, TN		
Kiwanis - Eliminate Program	Eliminate Maternal & Neonatal Tetanus	2,000
Ashland City, TN		
Land Trust of Tennessee	General Use	10,000
Lookout Mountain, TN		
Little Miss Mag Pre-School	General Use	24,988
Chattanooga, TN		
March of Dimes	Gourmet Gala Fundraiser	1,500
Chattanooga, TN		
Mark Making	Inner City School Art Education	4,000
Chattanooga, TN		
Memorial Health Care Foundation	General Use	24,988
Chattanooga, TN		
Museum Center at Five Points	General Use	10,000
Cleveland, TN		
National Museum of Racing & Hall of Fame	General Use	10,007
Saratoga Springs, NY		
The Nature Conservancy	Debt Relief	100,000
Arlington, VA		
The Nature Conservancy - Andros	General Use	10,000
Arlington, VA		
Nature Conservancy of WY	General Use	24,988
Lander, WY		
Normal Park Museum Magnet School	General Use	3,000
Chattanooga, TN		
On Point	General Use	32,000
Chattanooga, TN		
Polo Training Foundation	General Use	5,000
Nashville, TN		
Red Bank Highschool	Classroom Remodel	1,000
Chattanooga, TN		
St Andrews School	Student Financial Aid	10,000
Sewanee, TN		
St Peter's Episcopal	General Use	22,500
Chattanooga, TN		
Tall Timbers	General Use	1,000
Tallahassee, FL		
Tennessee River Gardens & Nature Preserve	General Use	500
Lookout Mountain, GA		
The Trust for Public Land	Extend Walking Trails	10,007
Chattanooga, TN		
United Way of Bradley County	General Use	10,000
Palm Beach County, FL		
United Way of Chattanooga	General Use	10,500
Chattanooga, TN		
University of Chattanooga Foundation	General Use	50,005
Chattanooga, TN		
US Sportsmen's Alliance Foundation	General Use	2,000
Columbus, OH		
USA Cycling	General Use	10,007
Colorado Springs, CO		
Wyoming Community Foundation	Donor Advised Fund SKJr Family Fund	30,010
Shendan, WY		
TOTAL		<u><u>1,201,230</u></u>

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 FROM K-1 ACL ALTERNATE FUND		P	VARIOUS	
b CAPITAL GAINS DIVIDENDS				
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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		12,960.	-12,960.
b 129,364.			129,364.
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(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			-12,960.
b			129,364.
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	1,200,276.
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

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

SOURCE	AMOUNT
FROM K-1 ACL ALTERNATIVE FUND	290.
NATURE CONSERVANCY	17,534.
SUNTRUST BANK - 7294	53.
SUNTRUST BANK - 7319	144.
SUNTRUST BANK - 7320	75.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	18,096.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
SUNTRUST BANK - 7294	267,683.	1.	267,682.
SUNTRUST BANK - 7319	307,415.	129,361.	178,054.
SUNTRUST BANK - 7320	55,449.	2.	55,447.
TOTAL TO FM 990-PF, PART I, LN 4	630,547.	129,364.	501,183.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FROM K-1 ACL ALTERNATIVE FUND	-11,375.	-11,375.	
TOTAL TO FORM 990-PF, PART I, LINE 11	-11,375.	-11,375.	

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OTHER PROFESSIONAL FEES	2,875.	1,437.		1,438.
TO FORM 990-PF, PG 1, LN 16C	2,875.	1,437.		1,438.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL TAX	189,082.	0.		0.
PAYROLL TAX	8,883.	4,441.		4,442.
FOREIGN TAX	5,730.	5,730.		0.
TO FORM 990-PF, PG 1, LN 18	203,695.	10,171.		4,442.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAXES & LICENSES	20.	10.		10.
DUES & SUBSCRIPTIONS	13,054.	6,527.		6,527.
SCHOLARSHIP EXPENSE	49,122.	0.		49,122.
GAS & OIL	7,266.	3,633.		3,633.
INVESTMENT EXPENSE	70,631.	70,631.		0.
EMPLOYEE INSURANCE	16,775.	8,387.		8,388.
WORKERS COMP	744.	372.		372.
BANK FEES	59.	29.		30.
OFFICE SUPPLIES	679.	340.		339.
TO FORM 990-PF, PG 1, LN 23	158,350.	89,929.		68,421.

FORM 990-PF	CORPORATE STOCK	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
430,908 SHS COCA-COLA ENTERPRISES, INC.	7,176,633.	11,826,120.
TOTAL TO FORM 990-PF, PART II, LINE 10B	7,176,633.	11,826,120.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	8
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
GENSPRING	COST	2,968,477.	2,968,477.
BESSEMER TRUST	COST	9,321,850.	9,321,850.
SILVER SPRING CAPITAL	COST	1,743,063.	1,743,063.
TOTAL TO FORM 990-PF, PART II, LINE 13		14,033,390.	14,033,390.

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
M. HAYNE HAMILTON	PRESIDENT			
CHATTANOOGA, TN 37377	5.00	116,920.	0.	0.
ANDREW G. COPE	TRUSTEE			
CHATTANOOGA, TN 37402	0.00	0.	0.	0.
PAMELA K. CUZZORT	TREASURER			
CHATTANOOGA, TN 37402	0.00	0.	0.	0.
LAVINIA J. CHERRY	TRUSTEE			
CHATTANOOGA, TN 37402	0.00	0.	0.	0.
S.K. JOHNSTON, JR.	TRUSTEE			
CHATTANOOGA, TN 37402	0.00	0.	0.	0.
GILLIAN E. JOHNSTON	TRUSTEE			
CHATTANOOGA, TN 37402	0.00	0.	0.	0.
ROBERT T. JOHNSTON	TRUSTEE			
CHATTANOOGA, TN 37402	0.00	0.	0.	0.
KATHERINE TUDOR	TRUSTEE			
CHATTANOOGA, TN 37402	0.00	0.	0.	0.
LESLIE JOHNSTON	TRUSTEE			
CHATTANOOGA, TN 37402	0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		116,920.	0.	0.

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 ☒
- 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 TUCKER FOUNDATION	Employer identification number (EIN) or 62-1603398
	Number, street, and room or suite no. If a P.O. box, see instructions. 600 KRYSTAL BUILDING	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. CHATTANOOGA, TN 37402	

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

PAM CUZZORT

- The books are in the care of ► **600 KRYSTAL BUIDLING - CHATTANOOGA, TN 37402**
Telephone No. ► **423-756-1202** 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	\$	14,888.
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	\$	94,880.
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)