



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form 990-PF

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

OMB No 1545-0052

2013

Department of the Treasury
Internal Revenue ServiceDo not enter Social Security numbers on this form as it may be made public.
Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning

, 2013, and ending

, 20

Name of foundation
IRENE & TUCKER GRIGG FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)
117 SHOCKOE SLIP

City or town, state or province, country, and ZIP or foreign postal code
RICHMOND, VA 23219

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$ 379791**

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis)

A Employer identification number
54-1694119

B Telephone number (see instructions)
804-783-1488

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

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) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	4380	4380		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	31078			
	b Gross sales price for all assets on line 6a 79918				
	7 Capital gain net income (from Part IV, line 2)		31078		
	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) SCH #1	2	2		
	12 Total. Add lines 1 through 11	35460	35460	-0-	
	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule) SCH #1	4227	4227		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) SCH #1	350	35		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) SCH #1	25			25
	24 Total operating and administrative expenses. Add lines 13 through 23	4602	4262	-0-	25
	25 Contributions, gifts, grants paid	15628			15628
	26 Total expenses and disbursements. Add lines 24 and 25	20230	4262	-0-	15653
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	15230			
	b Net investment income (if negative, enter -0-)		31198		
	c Adjusted net income (if negative, enter -0-)			-0-	

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2013)

12

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		25885	12094	12094
	2 Savings and temporary cash investments				
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶				
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7 Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments—U.S. and state government obligations (attach schedule)				
	b Investments—corporate stock (attach schedule) SCH #2		199985	229006	367697
	c Investments—corporate bonds (attach schedule)				
	11 Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶				
	12 Investments—mortgage loans				
	13 Investments—other (attach schedule)				
	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶				
	15 Other assets (describe ▶)				
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		225870	241100	379791
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)				
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 type="checkbox"/> and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds				
	28 Paid-in or capital surplus, or land, bldg., and equipment fund		10028	10028	
	29 Retained earnings, accumulated income, endowment, or other funds		215842	231072	
	30 Total net assets or fund balances (see instructions)		225870	241100	
	31 Total liabilities and net assets/fund balances (see instructions)		225870	241100	

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	225870
2 Enter amount from Part I, line 27a	2	15230
3 Other increases not included in line 2 (itemize) ▶	3	-0-
4 Add lines 1, 2, and 3	4	241100
5 Decreases not included in line 2 (itemize) ▶	5	-0-
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	241100

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	31078
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 }	3	-0-

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

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

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

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

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))
2012	14544	302924	.05
2011	8571	295820	.03
2010	7099	274479	.03
2009	27400	250391	.11
2008	21512	353751	.06

2 Total of line 1, column (d)	2	.28
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.06
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	341257
5 Multiply line 4 by line 3	5	20475
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	312
7 Add lines 5 and 6	7	20787
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	15653

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	624	
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2		
3	Add lines 1 and 2	3	624	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	624	
6	Credits/Payments:			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7		
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	624	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11	Enter the amount of line 10 to be. Credited to 2014 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

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 the definition)? <i>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.</i>		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. \$ NONE (2) On foundation managers. \$ NONE		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ NONE		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		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? <i>If "Yes," attach a conformed copy of the changes.</i>		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?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		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? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) VIRGINIA		
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? <i>If "No," attach explanation</i>	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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► THE FOUNDATION Telephone no. ► 804-783-1488 Located at ► 117 SHOCKOE SLIP, RICHMOND, VA ZIP+4 ► 23219-4121			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►		X	

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	N/A
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 2013?	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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► 20____, 20____, 20____, 20____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2013 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 2013.)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

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

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 ☐

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	322320
b	Average of monthly cash balances	1b	24134
c	Fair market value of all other assets (see instructions)	1c	-0-
d	Total (add lines 1a, b, and c)	1d	346454
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	346454
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	5197
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	341257
6	Minimum investment return. Enter 5% of line 5	6	17063

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	17063
2a	Tax on investment income for 2013 from Part VI, line 5	2a	624
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	624
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	16439
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	16439
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	16439

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	15653
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	15653
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	15653

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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				16439
2 Undistributed income, if any, as of the end of 2013:				
a Enter amount for 2012 only			14423	
b Total for prior years: 20____, 20____, 20____		-0-		
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	-0-			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ <u>15653</u>			14423	
a Applied to 2012, but not more than line 2a				
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 2013 distributable amount				1230
e Remaining amount distributed out of corpus	-0-			
5 Excess distributions carryover applied to 2013 (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 2012. Subtract line 4a from line 2a. Taxable amount—see instructions			-0-	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				15209
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 2008 not applied on line 5 or line 7 (see instructions)	-0-			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	-0-			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

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

N/A

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling ▶

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

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) 2013	(b) 2012	(c) 2011	(d) 2010	
b 85% of line 2a				
c Qualifying distributions from Part XII, line 4 for each year listed				
d Amounts included in line 2c not used directly for active conduct of exempt activities				
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
3 Complete 3a, b, or c for the alternative test relied upon:				
a "Assets" alternative test—enter:				
(1) Value of all assets				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				
c "Support" alternative test—enter:				
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				
(3) Largest amount of support from an exempt organization				
(4) Gross investment income				

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)**1 Information Regarding Foundation Managers:**

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

S. TUCKER GRIGG, JR.

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

NONE

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

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

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

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

- c** Any submission deadlines:

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

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

Recipient	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 SCHEDULE #4				
Total			▶ 3a	15628
b Approved for future payment				
Total			▶ 3b	-0-

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

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	4380	
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	31078	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a <u>DELL LITIGATION</u>			18	2	
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				35460	
13	Total. Add line 12, columns (b), (d), and (e)				13	35460

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

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

- | | | | | |
|----------|--|--------------|------------|-----------|
| 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) | | X |
| | (2) Other assets | 1a(2) | | X |
| b | Other transactions: | | | |
| | | | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | | X |
| | (4) Reimbursement arrangements | 1b(4) | | X |
| | (5) Loans or loan guarantees | 1b(5) | | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | | X |
| | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | | |

[illegible]

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

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

Signature of officer or trustee

Date _____

Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN	
------	--

Firm's name ▶

Firm's EIN ►

Firm's address ►

Phone no

IRENE AND TUCKER GRIGG FOUNDATION
54-1694119
2013

SCHEDULE #1

PART I
LINE 11

COLUMN A COLUMN B

DELL SECURITIES LITIGATION

\$2

\$2

\$2

\$2
=====

PART I
LINE 16C

COLUMN A COLUMN B COLUMN D

MERRILL LYNCH INVESTMENT FEE
MERRILL LYNCH CONSULTS FEE

\$150
\$4,077

\$150
\$4,077

\$4,227

\$4,227

\$0
=====

PART I
LINE 18

COLUMN A COLUMN B COLUMN D

EXCISE TAX BASED ON INVESTMENT INCOME
FOREIGN DIVIDEND TAX

\$315
\$35

\$35

\$350

\$35

\$0
=====

PART I
LINE 23

COLUMN A COLUMN B COLUMN D

STATE CORPORATION COMMISSION FILING FEE

\$25

\$25

IRENE AND TUCKER GRIGG FOUNDATION
54-1694119
2013*

SCHEDULE #2

PART II
LINE 10B

	NO OF SHARES	BOOK VALUE	FAIR MARKET VALUE
AIR PRODUCTS & CHEMICAL	82	\$7,199	\$9,166
ALLEGHANY	12	\$3,537	\$4,800
AGILENT TECHNOLOGIES	51	\$847	\$2,917
AMERIPRISE FINANCIAL	36	\$1,396	\$4,141
AMERICAN EXPRESS	293	\$12,164	\$26,584
ACTIVISION BLIZZARD	209	\$3,539	\$3,726
BROOKFIELD ASSET MANAGEMENT	121	\$4,565	\$4,698
BANK OF NEW YORK MELLON	674	\$19,249	\$23,550
BERKSHIRE HATHAWAY	169	\$10,562	\$20,036
BED BATH & BEYOND	209	\$9,840	\$16,783
CVS CAREMARK	334	\$10,283	\$23,905
CANADIAN NATURAL RESOURCES	304	\$10,078	\$10,287
COSTCO	154	\$6,576	\$18,329
CARMAX	37	\$1,743	\$1,740
COCA COLA	132	\$3,531	\$5,453
DIAGEO PLC SPSD ADR	83	\$5,407	\$10,990
DISNEY	70	\$3,705	\$5,348
EXPRESS SCRIPTS	155	\$6,903	\$10,887
EOG RESOURCES	77	\$5,268	\$12,923
ECOLAB	27	\$2,450	\$2,815
GOOGLE	24	\$15,611	\$26,898
HARLEY DAVIDSON	66	\$2,614	\$4,570
HEWLETT PACKARD	98	\$3,666	\$2,742
IRON MOUNTAIN	154	\$3,145	\$4,674
JPMORGAN CHASE	61	\$2,871	\$3,567
LABORATORY AMERICAN HOLDINGS	90	\$8,700	\$8,223
LOEWS	198	\$5,461	\$9,552
MONSANTO	48	\$4,412	\$5,595
MICROSOFT	97	\$2,806	\$3,629
OCCIDENTAL PETE	59	\$4,650	\$5,611
ORACLE	130	\$3,827	\$4,973
PHILIP MORRIS INTL	60	\$1,556	\$5,228
PACCAR	73	\$3,616	\$4,320
PROGRESSIVE	401	\$7,646	\$10,935
TEXAS INSTRUMENTS	179	\$4,136	\$7,860
UNITEDHEALTH GROUP	158	\$10,199	\$11,898
VISA	21	\$3,512	\$4,676
ACE LIMITED	19	\$1,798	\$1,967
WELLS FARGO	478	\$9,938	\$21,701
		\$229,006	\$367,697
		=====	=====

IRENE AND TUCKER GRIGG FOUNDATION
54-1694119
2013

SCHEDULE #3

PART IV
LINE 1

A	A	A	B	C	D	E	F	G	H
12 SHARES	AGILENT TECHNOLOGIES	P		11808	10213	499	0	404	95
40 SHARE	AGILENT TECHNOLOGIES	P		72508	10213	1,665	0	1,443	222
13 SHARES	AGILENT TECHNOLOGIES	P		121608	10213	541	0	216	325
25 SHARES	HARLEY DAVIDSON	P		101905	10213	1,244	0	1,218	26
78 SHARES	HARLEY DAVIDSON	P		10308	10213	3,882	0	3,555	327
7 SHARES	HARLEY DAVIDSON	P		10308	10313	347	0	319	28
15 SHARES	HARLEY DAVIDSON	P		120709	10313	743	0	428	315
13 SHARES	HARLEY DAVIDSON	P		81111	10313	644	0	470	174
28 SHARES	PFIZER	P		11910	10413	723	0	558	165
75 SHARES	PFIZER	P		21610	10413	1,935	0	1,330	605
2 SHARES	PFIZER	P		21710	10413	52	0	35	17
48 SHARES	PFIZER	P		21710	11813	1,269	0	851	418
52 SHARES	EOG RESOURCES	P		83104	30113	6,394	0	1,482	4,912
49 SHARES	OCCIDENTAL PETE	P		83104	31513	4,091	0	1,254	2,837
19 SHARES	AMERIPRISE FINANCIAL	P		83104	40413	1,365	0	588	777
3 SHARES	AMERIPRISE FINANCIAL	P		111005	40413	215	0	117	98
34 SHARES	AMERICAN EXPRESS	P		83104	40513	2,211	0	1,476	735
43 SHARES	CVS CAREMARK	P		120505	41813	2,446	0	1,324	1,122
38 SHARES	COSTCO WHOLESALE	P		83104	40513	4,000	0	1,592	2,408
27 SHARES	COSTCO WHOLESALE	P		83104	41913	2,815	0	1,131	1,684
86 SHARES	DEVON ENERGY	P		83104	41713	4,535	0	2,764	1,771
52 SHARES	WELLS FARGO	P		83104	41813	1,894	0	1,522	372
37 SHARES	CANADIAN NATURAL RES	P		120707	50313	1,090	0	1,245	(155)
33 SHARES	CANADIAN NATURAL RES	P		10308	50313	972	0	1,243	(271)
13 SHARES	DEVON ENERGY	P		83104	50313	752	0	418	334
34 SHARES	WALT DISNEY	P		81111	42613	2,106	0	1,108	998
22 SHARES	EOG RESOURCES	P		83104	50913	3,016	0	627	2,389
105 SHARES	PROGRESSIVE	P		10308	42913	2,652	0	1,953	699
19 SHARES	DEVON ENERGY	P		83104	70913	1,056	0	611	445
16 SHARES	DEVON ENERGY	P		120709	70913	889	0	1,061	(172)
26 SHARES	LOEWS	P		83104	70513	1,162	0	489	673
89 SHARES	LOEWS	P		83104	70813	4,004	0	1,675	2,329
21 SHARES	MONSANTO	P		20510	72413	2,139	0	1,597	542
14 SHARES	MONSANTO	P		81111	72413	1,426	0	962	464
46 SHARES	OCCIDENTAL PETE	P		83104	81313	4,046	0	1,177	2,869
8 SHARES	OCCIDENTAL PETE	P		71608	81313	704	0	632	72
44 SHARES	WELLS FARGO	P		83104	80513	1,952	0	1,288	664
47 SHARES	POTASH	P		32912	91313	1,533	0	2,122	(589)
24 SHARES	POTASH	P		92112	91313	783	0	1,061	(278)
30 SHARES	TRANSOCEAN LTD	P		60606	90913	1,415	0	2,460	(1,045)
6 SHARES	TRANSOCEAN LTD	P		120709	90913	283	0	501	(218)
49 SHARES	WALT DISNEY	P		81111	101713	3,238	0	1,597	1,641
18 SHARES	WALT DISNEY	P		92612	101713	1,190	0	936	254

79,918	0	48,840	31,078
=====	=====	=====	=====

IRENE AND TUCKER GRIGG FOUNDATION
54-1694119
2013

SCHEDULE #4

PART XV
LINE 3A

COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
CHILDFUND INTERNATIONAL 2821 EMERYWOOD PARKWAY RICHMOND, VA 23294	N/A	PUBLIC	SPONSOR TO UNDERPRIVILEGED CHILDREN	378
ST CHRISTOPHER'S SCHOOL FOUNDATION 711 ST CHRISTOPHER'S ROAD RICHMOND, VA 23226	N/A	PRIVATE	SUPPORT FOR QUALITY EDUCATION	2,100
CYSTIC FIBROSIS FOUNDATION 6931 ARLINGTON ROAD BETHESDA, MD. 20814	N/A	PUBLIC	PROVIDES ONGOING RESEARCH IN FINDING A CURE FOR CF	3,000
SCIENCE MUSEUM OF VIRGINIA 2500 WEST BROAD STREET RICHMOND, VA 23220	N/A	PUBLIC	PROVIDES SCIENCE ACTIVITIES TO THE RICHMOND COMMUNITY	200
ST SIMONS PRESBYTERIAN CHURCH 205 KING'S WAY ST SIMONS ISLAND, GA 31522	N/A	PUBLIC	TO BENEFIT THE PLEDGE TO CHURCH SERVICES	1,500
VCU SCHOOL OF THE ARTS P O BOX 842519 RICHMOND, VA. 23284-2519	N/A	PUBLIC	TO PROVIDE HELP TOWARDS BUILDING A NEW GALLERY	1,500
HUMANE SOCIETY OF SOUTH COASTAL GEORGIA 4627 US HIGHWAY 17 N BRUNSWICK, GA 31525	N/A	PUBLIC	TO PROVIDE FOR A BETTER FUTURE FOR ALL ANIMALS	250
RIVER ROAD PRESBYTERIAN CHURCH 8960 RIVER ROAD RICHMOND, VA 23229	N/A	PUBLIC	TO BENEFIT THE PLEDGE TO CHURCH SERVICES	2,000
THE GATHERING PLACE P O BOX 772 BRUNSWICK, GA 31521	N/A	PUBLIC	HELPS STUDENTS LEARN TO BE MORE EFFECTIVE THROUGH CHRIST	2,500
STAR FOUNDATION 1907 GLOUCESTER STREET BRUNSWICK, GA 31520	N/A	PUBLIC	HELPS PEOPLE BECOME SELF SUFFICIENT THROUGH EDUCATION	500
GOLDEN ISLES ACT P O BOX 31012 SEA ISLAND, GA 31561	N/A	PUBLIC	SUPPORT LOCAL ISSUES AND NEEDS OF THE COMMUNITY	1,500
THE ARTS IN HEALTH CARE P O BOX 980510 RICHMOND, VA 23298	N/A	PUBLIC	TO PROVIDE MUSIC THERAPY TO THE SICK.	200
				15,628 =====