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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 04-01-2015, and ending 03-31-2016

Name of foundation Legg Mason Charitable Foundation Inc		A Employer identification number 31-1738146	
Number and street (or P O box number if mail is not delivered to street address) 100 International Drive		B Telephone number (see instructions) (410) 539-0000	
City or town, state or province, country, and ZIP or foreign postal code Baltimore, MD 21202		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		Initial return of a former public charity ☐ Amended return ☐ 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		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 ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 3,601,273		J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

Part I			Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	1,000,000					
	2	Check ☐ if the foundation is not required to attach Sch B						
	3	Interest on savings and temporary cash investments						
	4	Dividends and interest from securities						
	5a	Gross rents						
	b	Net rental income or (loss) _____						
	6a	Net gain or (loss) from sale of assets not on line 10						
	b	Gross sales price for all assets on line 6a _____						
	7	Capital gain net income (from Part IV, line 2) . . .		0				
	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) (attach schedule)						
11	Other income (attach schedule)							
12	Total. Add lines 1 through 11	1,000,000	0					
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0		
	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)						
	17	Interest						
	18	Taxes (attach schedule) (see instructions) . . .						
	19	Depreciation (attach schedule) and depletion . . .						
	20	Occupancy						
	21	Travel, conferences, and meetings.						
	22	Printing and publications						
	23	Other expenses (attach schedule).	6,598	6,598		0		
	24	Total operating and administrative expenses. Add lines 13 through 23	6,598	6,598		0		
	25	Contributions, gifts, grants paid	1,481,773			1,586,750		
	26	Total expenses and disbursements. Add lines 24 and 25	1,488,371	6,598		1,586,750		
27	Subtract line 26 from line 12							
a	Excess of revenue over expenses and disbursements	-488,371						
b	Net investment income (if negative, enter -0-)		0					
c	Adjusted net income (if negative, enter -0-) . . .							

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	4,194,621	835,872	835,872
	2	Savings and temporary cash investments		2,765,401	2,765,401
	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)			
	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)	4,194,621	3,601,273	3,601,273	
Liabilities	17	Accounts payable and accrued expenses	1,498		
	18	Grants payable	284,707	181,228	
	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)	286,205	181,228	
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	3,908,416	3,420,045	
	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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances(see instructions)	3,908,416	3,420,045	
31	Total liabilities and net assets/fund balances(see instructions)	4,194,621	3,601,273		

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	3,908,416
2	Enter amount from Part I, line 27a	2	-488,371
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	3,420,045
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	3,420,045

Part IV

Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (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			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
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	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

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

1 Enter the appropriate amount in each column for each year, see 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))
2014	1,651,277	5,318,842	0 310458
2013	1,457,679	6,483,574	0 224826
2012	1,280,503	7,737,119	0 165501
2011	1,419,246	7,810,475	0 181711
2010	1,545,409	8,784,372	0 175927

2	Total of line 1, column (d).	2	1 058423
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 211685
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	3,760,506
5	Multiply line 4 by line 3.	5	796,043
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	0
7	Add lines 5 and 6.	7	796,043
8	Enter qualifying distributions from Part XII, line 4.	8	1,586,750

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 page 18 of the 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

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

0

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

0

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

422

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

422

8

Enter any penalty for underpayment of estimated tax. Check here ☐ 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

422

11

Enter the amount of line 10 to be Credited to 2015 estimated tax 422 Refunded

11

0

Part VII-A

Statements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a

No

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.

1b

No

c

Did the foundation file Form 1120-POL for this year?

1c

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year
(1) On the foundation \$ 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.

2

No

3

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes.

3

No

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a

No

b

If "Yes," has it filed a tax return on Form 990-T for this year?

4b

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

Yes

7

Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.

7

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions)
MD

b

If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation.

8b

Yes

9

Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)?
If "Yes," complete Part XIV.

9

No

10

Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

10

No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address n/a	13	Yes	
14	The books are in care of Kory Herndon Telephone no (410) 539-0000 Located at 100 INTERNATIONAL DRIVE BALTIMORE MD ZIP+4 212021476			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2015, 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country	16	Yes	No

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.	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 2015?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? 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		
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?			
b	If "Yes," did it have excess business holdings in 2015 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 2015.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

Part VII-B

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

5a

During the year did the foundation pay or incur any amount to

(1)

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

☐ 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 4945(d)(4)(A)? (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)?

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?

☐ 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

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?

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances

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 (see instructions). If none, enter "NONE".

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

Total number of others receiving over \$50,000 for professional services. 0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

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	115,225
b	Average of monthly cash balances.	1b	3,702,548
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,817,773
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	3,817,773
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	57,267
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,760,506
6	Minimum investment return. Enter 5% of line 5.	6	188,025

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	188,025
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	0
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	188,025
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	188,025
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	188,025

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	1,586,750
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	1,586,750
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,586,750

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				188,025
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.	1,106,346			
b From 2011.	1,028,722			
c From 2012.	893,647			
d From 2013.	1,133,500			
e From 2014.	1,385,335			
f Total of lines 3a through e.	5,547,550			
4 Qualifying distributions for 2015 from Part XII, line 4				
\$ 1,586,750				
a Applied to 2014, 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 2015 distributable amount.				188,025
e Remaining amount distributed out of corpus	1,398,725			
5 Excess distributions carryover applied to 2015 (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	6,946,275			
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 2014 Subtract line 4a from line 2a Taxable amount—see instructions.			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions).	1,106,346			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	5,839,929			
10 Analysis of line 9				
a Excess from 2011.	1,028,722			
b Excess from 2012.	893,647			
c Excess from 2013.	1,133,500			
d Excess from 2014.	1,385,335			
e Excess from 2015.	1,398,725			

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 <i>Paid during the year</i> See Additional Data Table				
Total			3a	1,586,750
b <i>Approved for future payment</i> SAINT IGNATIUS LOYOLA ACADEMY 300 EAST GITTINGS ST BALTIMORE, MD 21230	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	150,000
THE KENNEDy Center 2700 F STREET NW WASHINGTON, DC 20566	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	34,000
Total			3b	184,000

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments.						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities. . . .						
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						
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory . . .						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal Add columns (b), (d), and (e). . .		0		0		0
13 Total. Add line 12, columns (b), (d), and (e).			13			0

(See worksheet in line 13 instructions to verify calculations)

[illegible]

l. 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?

(1) Cash.

(2) Other assets.

- (1)** Sales of assets to a noncharitable exempt organization.
- (2)** Purchases of assets from a noncharitable exempt organization.
- (3)** Rental of facilities, equipment, or other assets.
- (4)** Reimbursement arrangements.
- (5)** Loans or loan guarantees.
- (6)** Performance of services or membership or fundraising solicitations.

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.

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

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

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	2016-10-14 _____ Date	***** _____ Title
--	--	--

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

Paid Preparer Use Only	Print/Type preparer's name Lori S Burghauser	Preparer's Signature	Date 2016-10-14	Check if self-employed ☒	PTIN P00370694
	Firm's name ☒ SC&H TAX & ADVISORY SERVICES LLC			Firm's EIN ☒ 20-5991824	
	Firm's address ☒ 910 RIDGEBROOK ROAD SPARKS, MD 21152			Phone no (410) 403-1500	

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
Alan Magleby	Director 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Joseph A Sullivan	Director/President 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Peter H Nachtwey	VP & Treasurer 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Auburn Bell	Vice President 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Jennifer Byers	Vice President 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Susan Cutler	Vice President 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Gregg D Gorman	Vice President 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Dana Jackson	Vice President 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Tina Jurman	Vice President 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
John Kenney	Vice President 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Michael P McAllister	vice President 1 00	0	0	0
100 INTERNATIONAL DRIVE Baltimore,MD 21202				
Thomas C Merchant	Secretary 1 00	0	0	0
100 INTERNATIONAL DRIVE BALTIMORE,MD 21202				
Beth O'Malley	assistant Secretary 1 00	0	0	0
100 INTERNATIONAL DRIVE bALTIMORE,MD 21202				
Melissa Warren	Assistant Secretary 1 00	0	0	0
100 INTERNATIONAL DRIVE bALTIMORE,MD 21202				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN HEART ASSOCIATION 217 E REDWOOD ST 23RD FL BALTIMORE,MD 21202	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	15,000
AMERICAN RED CROSS 2025 E STREET N W WASHINGTON,DC 20006	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	5,000
AMERICARES FOUNDATION INC 88 HAMILTON AVE STAMFORD,CT 06902	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	20,000
ARCHDIOCESE OF BALTIMORE 302 CATHEDRAL ST STE 208 BALTIMORE,MD 21201	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	50,000
ASSOCIATED CATHOLIC CHARITIES 320 CATHEDRAL ST BALTIMORE,MD 21201	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	50,000
BALTIMORE CHILD ABUSE CENTER 2300 N CHARLES ST 4TH FLOOR BALTIMORE,MD 21218	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	1,000
BALTIMORE COMMUNITY FOUNDATION 2 EAST READ ST BALTIMORE,MD 21202	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	50,000
BALTIMORE CURRICULUM PROJECT INC 2707 E FAYETTE ST BALTIMORE,MD 21224	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	25,000
BALTIMORE EDUCATIONAL SCHOLARSHIP TRUST 808 CHARLES ST BALTIMORE,MD 21201	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	25,000
BALTIMORE OUTREACH SERVICES 701 S CHARLES ST BALTIMORE,MD 21230	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	5,000
BALTIMORE SCHOOL FOR THE ARTS 712 CATHEDRAL ST BALTIMORE,MD 21201	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	25,000
BIG APPLE PERFORMING ARTS INC 676A 9TH AVENUE SUITE 405 NEW YORK,NY 10036	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	1,000
BIG BROTHERS BIG SISTERS OF NYC 40 RECTOR ST 11TH FL NEW YORK,NY 10006	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	16,250
BIG BROTHERS BIG SISTERS OF THE GREATER CHESAPEAKE 3600 CLIPPER MILL RD SUITE 250 BALTIMORE,MD 21211	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	20,000
BOOKS FOR KIDS FOUNDATION CO CLAL 240 WEST 37TH STREET SUITE 309 NEW YORK,NY 10016	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	50,000
Total			3a	1,586,750

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOTTOM LINE INC 500 ARMORY ST STE 3 JAMICA PLAIN,MA 02130	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	50,000
BOY SCOUTS OF AMERICA 701 WYMAN PARK DR BALTIMORE,MD 21211	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	10,000
BOYS HOPE GIRLS HOPE OF BALTIMORE 3700 E NORTHERN PARKWAY 2ND FLOOR BALTIMORE,MD 21206	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	50,000
BOYS HOPE GIRLS HOPE PO BOX 80477 STATEN ISLAND,NY 10308	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	50,000
BRIDGEPORT HOSPITAL FOUNDATION 267 GRANT STREET BRIDGEPORT,CT 06610	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	1,000
BUILDERS BEYOND BORDERS 66 FORT POINT ST NORWALK,CT 06855	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	2,500
BUILDON INC PO BOX 16741 STAMFORD,CT 06905	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	10,000
BUSINESS VOLUNTEERS MARYLAND 1201 S SHARP ST SUITE 302 BALTIMORE,MD 21230	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	20,000
CATHEDRAL SPIRES FOUNDATION LIMITED 350 EAST 56TH STREET NEW YORK,NY 10022	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	2,500
CENTRAL SCHOLARSHIP BUREAU INC 6 PARK CENTER COURT STE 211 OWINGS MILLS,MD 21117	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	25,000
CHARLES VILLAGE COMMUNITY FOUNDATION 2432 SAINT PAUL ST BALTIMORE,MD 21218	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	1,000
CHILD ADVOCATES OF CONNECTICUT INC 383 MAIN AVE SUITE 409 NORWALK,CT 06851	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	5,000
CHILDCARE LEARNING CENTERS INC 64 PALMERS HILL RD STAMFORD,CT 06902	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	50,000
CHILDREN SCHOLARSHIP FUND BALTIMORE 1000 ST PAUL ST BALTIMORE,MD 21202	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	25,000
CHILDREN'S SCHOLARSHIP FUND 8 W 38TH ST 9TH FLOOR NEW YORK,NY 10018	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	25,000
Total			3a	1,586,750

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CITY OF BALTIMORE DEVELOPMENT CORP 36 S CHARLES ST SUITE 1600 BALTIMORE,MD 21201	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	10,000
COLLEGEBOUND FOUNDATIONS 300 WATER ST BALTIMORE,MD 21202	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	60,000
COLUMBIA CHAMBER ORCHESTRA OF HOWARD COUNTY 8510 HIGH RIDGE RD ELLICOTT CITY,MD 21043	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	1,000
COMMUNITY COLLEGE OF BALTIMORE COUNTY FOUNDATION INC 7200 SOLLERS POINT ROAD BALTIMORE,MD 21222	N/A	PC	GENERAL PURPOSE GRANTS/CONTRIBUTIONS	10,000
COOL KIDS CAMPAIGN FOUNDATION INC 8422 BELLONA LANE TOWSON,MD 21204	n/a	PC	general purpose grants/contributions	15,000
Downtown Baltimore Family Alliance 714 S Wolfe St Baltimore,MD 21231	n/a	PC	general purpose grants/contributions	10,000
Enoch Pratt Free Library 400 CATHEDRAL ST BALTIMORE,MD 21201	n/a	PC	general purpose grants/contributions	5,000
THE EVERYMAN THEATRE INC 1727 N Charles St Baltimore,MD 21201	n/a	PC	general purpose grants/contributions	15,000
FAMILY CENTERS INC PO BOX 7550 GREENWICH,CT 06836	n/a	PC	general purpose grants/contributions	25,000
Friendship Outreach Center Inc 7109 Harford Rd Parkville,MD 21234	n/a	PC	general purpose grants/contributions	1,000
GB Charities Inc PO BOX 4954 BALTIMORE,MD 210944954	n/a	PC	general purpose grants/contributions	5,000
Gregorian University Foundation Inc 106 W 56th St New York,NY 10019	n/a	PC	general purpose grants/contributions	20,000
Hibernian Society of Baltimore PO Box 18 Timonium,MD 21094	n/a	PC	general purpose grants/contributions	10,000
Hippodrome Foundation Inc 416 W Baltimore St Baltimore,MD 21201	n/a	PC	general purpose grants/contributions	5,000
Inspirica Inc 141 Franklin St Stamford,CT 06901	n/a	PC	general purpose grants/contributions	1,000
Total 3a				1,586,750

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Johns Hopkins University 100 N CHARLES ST STE 316 BALTIMORE,MD 21201	n/a	PC	general purpose grants/contributions	10,000
Junior Achievement of Central Maryland 10711 RED RUN BLVD OWINGS MILLS,MD 21117	n/a	PC	general purpose grants/contributions	15,000
LIVING CLASSROOMS FOUNDATION 802 S CAROLINE ST BALTIMORE,MD 21231	n/a	PC	general purpose grants/contributions	50,000
Lous Lads Foundation 30 S Meridian St Suite 600 Indianapolis,IN 46204	n/a	PC	general purpose grants/contributions	2,500
Maryland Council on Economic Education Towson University 8000 York Road Towson,MD 21252	n/a	PC	general purpose grants/contributions	5,000
MARYLAND FAMILY NETWORK INC 1001 EASTERN AVE 2ND FLOOR BALTIMORE,MD 212024364	n/a	PC	general purpose grants/contributions	25,000
Maryland Historical Society 201 W MONUMENT ST BALTIMORE,MD 21201	n/a	PC	general purpose grants/contributions	3,000
Maryland SPCA 3300 FALLS RD BALTIMORE,MD 21211	n/a	PC	general purpose grants/contributions	10,000
Maryland Volunteer Lawyers Service 201 N Charles St Suite 1400 Baltimore,MD 21201	n/a	PC	general purpose grants/contributions	2,500
Morgan State University Foundation Inc 1700 E Cold Sprint Ln Truth Hall 201 Baltimore,MD 21251	n/a	PC	general purpose grants/contributions	1,000
MOTT HAVEN ACADEMY CHARTER SCHOOL 170 BROWN PL BRONX,NY 10454	n/a	PC	general purpose grants/contributions	50,000
MOVEABLE FEAST PO Box 2298 Baltimore,MD 21203	n/a	PC	general purpose grants/contributions	1,000
NEW LEADERS 30 W 26TH ST 2ND FL NEW YORK,NY 10010	n/a	PC	general purpose grants/contributions	100,000
New Pathways 110 West Rd Towson,MD 21204	n/a	PC	general purpose grants/contributions	2,500
Pauls Place 1118 Ward St Baltimore,MD 21230	n/a	PC	general purpose grants/contributions	5,000
Total			3a	1,586,750

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Pushing Pink Elephants 2952 RAKING LEAF DR ABINGDON,MD 21009	n/a	PC	general purpose grants/contributions	2,500
Saint Ignatius Loyola Academy 300 EAST GITTINGS ST BALTIMORE,MD 21230	n/a	PC	general purpose grants/contributions	64,500
SAMUEL READY SCHOLARSHIPS INC PO BOX 202 RIDERWOOD,MD 211390202	n/a	PC	general purpose grants/contributions	25,000
Stevenson University 1525 Greenspring Valley Rd Stevenson,MD 21153	n/a	PC	general purpose grants/contributions	15,000
TEACH FOR AMERICA 2601 N HOWARD ST BALTIMORE,MD 21218	n/a	PC	general purpose grants/contributions	100,000
The Dream Factory of Pennsylvania PO Box 461 Wayne,PA 19087	n/a	PC	general purpose grants/contributions	5,000
The Kennedy Center 2700 F STREET NW WASHINGTON,DC 20566	n/a	PC	general purpose grants/contributions	33,000
THE WALTERS ART MUSEUM 600 N CHARLES STREET BALTIMORE,MD 21201	n/a	PC	general purpose grants/contributions	35,000
THREAD INC PO Box 1584 Baltimore,MD 21203	n/a	PC	general purpose grants/contributions	25,000
Towson University Foundation 8000 York Rd Towson,MD 21252	n/a	PC	general purpose grants/contributions	2,500
Urban Alliance Foundation 2030 Q St NW Washington,DC 20009	n/a	PC	general purpose grants/contributions	10,000
URBAN TEACHER CENTER 1500 Union Ave Ste 2200 Baltimore,MD 21211	n/a	PC	general purpose grants/contributions	25,000
Veritans Club 625 LAFAYETTE AVE HAWTHORNE,NJ 07506	n/a	PC	general purpose grants/contributions	2,500
Volunteer Center of Bergen County 64 Passaic St Hackensack,NJ 07601	n/a	PC	general purpose grants/contributions	1,000
YMCA OF CENTRAL MARYLAND INC 303 W Chesapeake Ave BALTIMORE,MD 21204	n/a	PC	general purpose grants/contributions	30,000
Total			3a	1,586,750

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
YMCA OF GREATER NEW YORK 5 W 63RD ST NEW YORK, NY 10023	n/a	PC	general purpose grants/contributions	25,000
YMCA OF STAMFORD 10 BELL ST STAMFORD, CT 06901	n/a	PC	general purpose grants/contributions	25,000
Total				1,586,750

TY 2015 General Explanation Attachment**Name:** Legg Mason Charitable Foundation Inc**EIN:** 31-1738146

Identifier	Return Reference	Explanation
	Form 990-PF, Part 1, Lines 13-23	LEGG MASON, INC PAYS ALL OF THE OPERATING EXPENSES OF THE FOUNDATION THE OPERATING EXPENSES INCLUDE ALL EXPENSES ATTRIBUTABLE TO ITS OPERATIONS INCLUDING LEGAL FEES, PROFESSIONAL SERVICES AND PAYROLL THE PAYMENT OF THESE EXPENSES HAS NOT BEEN REFLECTED IN THE RETURN

TY 2015 Other Expenses Schedule

Name: Legg Mason Charitable Foundation Inc

EIN: 31-1738146

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	6,598	6,598		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.	OMB No 1545-0047 2015
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Name of the organization Legg Mason Charitable Foundation Inc	Employer identification number 31-1738146
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Organization type (check one)

Filers of: Form 990 or 990-EZ Form 990-PF	Section: ☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization ☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation
--	---

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization Legg Mason Charitable Foundation Inc	Employer identification number 31-1738146
---	---

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	LEGG MASON INC	\$ 1,000,000	Person ☒
	100 INTERNATIONAL DRIVE		Payroll ☐
	BALTIMORE, MD 21202		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Employer identification number
31-1738146

Part II **Noncash Property**
(see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Employer identification number
31-1738146

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		