See a Social Security Number? Say Something!
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Or call the IRS Identity Theft Hotline at 1-800-908-4490

Form **990-EZ**

Department of the Treasury
Internal Revenue Service

Short Form
Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than $1,000,000 and total assets less than $2,500,000 at the end of the year may use this form

▶ *The organization may have to use a copy of this return to satisfy state reporting requirements*

OMB No 1545-1150

2008

Open to Public Inspection

A For the 2008 calendar year, or tax year beginning 08/01 , 2008, and ending 07/31/2009

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Termination ☐ Amended return ☐ Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization: SOUTHWEST FOUNDATION FORUM

Number and street (or P O. box, if mail is not delivered to street address): P. O. BOX 6648 — Room/suite:

City or town, state or country, and ZIP + 4: SAN ANTONIO, TX 78209

D Employer identification number: 23-7080207

E Telephone number: (210) 930-6033

F Group Exemption Number ▶

- *Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).*

G Accounting method: [X] Cash [ ] Accrual Other (specify) ▶

H Check ▶ [ ] if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

I Website: ▶ WWW. SFBR. ORG/SWFF

J Organization type (check only one) - [X] 501(c) (3) ◀ (insert no.) [ ] 4947(a)(1) or [ ] 527

K Check ▶ [ ] if the organization is not a section 509(a)(3) supporting organization **and** its gross receipts are normally **not** more than $25,000. A return is not required, but if the organization chooses to file a return, be sure to file a complete return.

L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, if $1,000,000 or more, file Form 990 instead of Form 990-EZ . . ▶ $ 330,020.

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I)

Revenue	1	Contributions, gifts, grants, and similar amounts received		1	128,300.
	2	Program service revenue including government fees and contracts		2	13,343.
	3	Membership dues and assessments		3	28,800.
	4	Investment income STMT 1		4	171.
	5a	Gross amount from sale of assets other than inventory	5a		
	b	Less cost or other basis and sales expenses	5b		
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule)		5c	
	6	Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ▶ ☐			
	a	Gross revenue (not including $ 120,000. of contributions reported on line 1)	6a 159,406.		
	b	Less direct expenses other than fundraising expenses	6b 104,334.		
	c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a). STMT 2		6c	55,072.
	7a	Gross sales of inventory, less returns and allowances	7a		
	b	Less cost of goods sold	7b		
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)		7c	
	8	Other revenue (describe ▶)		8	
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 ▶		9	225,686.
Expenses	10	Grants and similar amounts paid (attach schedule) STMT 3		10	218,079.
	11	Benefits paid to or for members		11	
	12	Salaries, other compensation, and employee benefits		12	NONE
	13	Professional fees and other payments to independent contractors		13	
	14	Occupancy, rent, utilities, and maintenance		14	
	15	Printing, publications, postage, and shipping		15	8,402.
	16	Other expenses (describe ▶ STMT 4)		16	17,500.
	17	**Total expenses.** Add lines 10 through 16 ▶		17	243,981.
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)		18	-18,295.
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)		19	44,639.
	20	Other changes in net assets or fund balances (attach explanation) STMT 5		20	2,098.
	21	Net assets or fund balances at end of year Combine lines 18 through 20 ▶		21	28,442.

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OGDEN, UT

Part II Balance Sheets. If Total assets on line 25, column (B) are $2,500,000 or more, file Form 990 instead of Form 990-EZ

(See the instructions for Part II.)		(A) Beginning of year		(B) End of year
22	Cash, savings, and investments STMT 6	44,106.	22	27,621.
23	Land and buildings		23	
24	Other assets (describe ▶ STMT 7)	533.	24	821.
25	**Total assets**	44,639.	25	28,442.
26	**Total liabilities** (describe ▶)		26	
27	**Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	44,639.	27	28,442.

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Part III Statement of Program Service Accomplishments (See the instructions for Part III.)

What is the organization's primary exempt purpose? STMT 8

Describe what was achieved in carrying out the organization's exempt purposes In a clear and concise manner, describe the services provided, the number of persons benefited, or other relevant information for each program title.

Expenses (Required for 501(c)(3) and (4) organizations and 4947(a)(1) trusts, optional for others.)

28	SOUTHWEST FOUNDATION FOR BIOMEDICAL RESEARCH - - CASH GRANTS TO THIS ORGANIZATION, WHICH IS ENGAGED IN BASIC BIOMEDICAL/ RELATED SCIENTIFIC RESEARCH. (Grants $ 204,779.) If this amount includes foreign grants, check here ▶ ☐	28a	204,779.
29	SEE STATEMENT 9 (Grants $ 13,300.) If this amount includes foreign grants, check here ▶ ☐	29a	13,300.
30	(Grants $) If this amount includes foreign grants, check here ▶ ☐	30a	
31	Other program services (attach schedule) (Grants $) If this amount includes foreign grants, check here ▶ ☐	31a	
32	**Total program service expenses** (add lines 28a through 31a) ▶	32	218,079.

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See the instructions for Part IV.)

(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 & deferred compensation	(e) Expense account and other allowances
SEE STATEMENT 10		-0-	-0-	-0-

Part V Other Information (Note the statement requirements in the instructions for Part VI.)

			Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	33		X
34	Were any changes made to the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes	34		X
35	If the organization had income from business activities, such as those reported on lines 2, 6a and 7a (among others), but **not** reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T.			
a	Did the organization have unrelated business gross income of $1,000 or more or section 6033(e) notice, reporting, and proxy tax requirements?	35a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	35b		X
36	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Schedule N	36		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a NONE			
b	Did the organization file **Form 1120-POL** for this year?	37b		X
38a	Did the organization borrow from or make any loans to, any officer, director, trustee, or key employee **or** were any such loans made in a prior year and still unpaid at the start of the period covered by this return?	38a		X
b	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b			
39	Section 501(c)(7) organizations Enter			
a	Initiation fees and capital contributions included on line 9 39a			
b	Gross receipts, included on line 9, for public use of club facilities 39b			
40a	Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ▶ NONE, section 4912 ▶ NONE, section 4955 ▶ NONE			
b	Section 501(c)(3) and (4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," complete Schedule L, Part I	40b		X
c	Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ NONE			
d	Enter amount of tax on line 40c reimbursed by the organization ▶ NONE			
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e		X

41 List the states with which a copy of this return is filed. ▶

42a The books are in care of ▶ TREASURER Telephone no ▶ (210)822-4815
Located at ▶ P. O. BOX 6648 SAN ANTONIO, TX ZIP + 4 ▶ 78209

			Yes	No
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b		X
	If "Yes," enter the name of the foreign county ▶			
	See the instructions for exceptions and filing requirements for **Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.**			
c	At any time during the calendar year, did the organization maintain an office outside of the U.S.?	42c		X
	If "Yes," enter the name of the foreign country ▶			

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43

			Yes	No
44.	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44		X
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	45		X

Part VI **Section 501(c)(3) organizations only.** All section 501(c)(3) organizations must answer questions 46-49 and complete the tables for lines 50 and 51.

			Yes	No
46	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46		X
47	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	47		X
48	Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48		X
49a	Did the organization make any transfers to an exempt non-charitable related organization?	49a		X
b	If "Yes," was the related organization(s) a section 527 organization?	49b		X

50 Complete this table for the five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than $100,000 of compensation from the organization If there is none, enter "None "

(a) Name and address of each employee paid more than $100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
NONE				
Total number of other employees paid over $100,000 ▶	NONE			

51 Complete this table for the five highest compensated independent contractors who each received more than $100,000 of compensation from the organization If there is none, enter "None "

(a) Name and address of each independent contractor paid more than $100,000	(b) Type of service	(c) Compensation
NONE		
Total number of other independent contractors receiving over $100,000 ▶	NONE	

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 officer) is based on all information of which preparer has any knowledge

▶ Anne Heaner 12-9-09
Signature of officer Date

▶ Anne Heaner Treasurer
Type or print name and title

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed ▶ ☐	Preparer's Identifying Number (See instructions)
Stewart Gordon	2 Dec 2009		
Firm's name (or yours if self-employed), address, and ZIP + 4: ERNST & YOUNG U.S. LLP, P. O. BOX 2938 SAN ANTONIO, TX 78299-2938		EIN ▶34-6565596	Phone no ▶210-228-9696

May the IRS discuss this return with the preparer shown above? See instructions ▶ [X] Yes ☐ No

SCHEDULE A (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

▶ **Attach to Form 990 or Form 990-EZ.** ▶ **See separate instructions.**

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization	**Employer identification number**
SOUTHWEST FOUNDATION FORUM	23-7080207

Part I Reason for Public Charity Status (All organizations must complete this part.) (see instructions)

The organization is not a private foundation because it is: (Please check only **one** organization.)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).** (Attach Schedule H.)

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II)

9 ☒ An organization that normally receives (1) more than 33 1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).** (see instructions)

11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.

a ☐ Type I **b** ☐ Type II **c** ☐ Type III - Functionally Integrated **d** ☐ Type III - Other

e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

f If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box . . . . . ☐

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

		Yes	No
(i)	A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?	11g(i)	X
(ii)	A family member of a person described in (i) above?	11g(ii)	X
(iii)	A 35% controlled entity of a person described in (i) or (ii) above?	11g(iii)	X

h Provide the following information about the organizations the organization supports.

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
Total									

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)** (Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1-3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 **Public support.** Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
11 **Total support.** Add lines 7 through 10						

12 Gross receipts from related activities, etc (See instructions.) 12

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and **stop here** . . . . . ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f)) . . . . . 14 %

15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f . . . . . 15 %

16a **33 1/3% support test - 2008.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶ ☐

b **33 1/3% support test - 2007.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶ ☐

17a **10%-facts-and-circumstances test - 2008.** If the organization did not check a box on line 13, 16a or 16b, and line 14 is 10% or more, and if the organization meets the "fact-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts and circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶ ☐

b **10%-facts-and-circumstances test - 2007.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances"" test. The organization qualifies as a publicly supported organization . . . . . ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . ▶ ☐

Part III Support Schedule for Organizations Described in Section 509(a)(2)
(Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	80,855.	169,265.	196,510.	208,030.	157,100.	811,760.
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	145,643.	104,272.	204,165.	184,456.	172,749.	811,285.
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1-5	226,498.	273,537.	400,675.	392,486.	329,849.	1,623,045.
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	NONE	NONE	NONE	NONE	NONE	NONE
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or $5,000	NONE	NONE	NONE	NONE	NONE	NONE
c Add lines 7a and 7b	NONE	NONE	NONE	NONE	NONE	NONE
8 **Public support** (Subtract line 7c from line 6)						1,623,045.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
9 Amounts from line 6	226,498.	273,537.	400,675.	392,486.	329,849.	1,623,045.
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	171.	698.	630.	445.	171.	2,115.
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b	171.	698.	630.	445.	171.	2,115.
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
13 **Total support.** (Add lines 9, 10c, 11, and 12)						1,625,160.

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	15	99.87%
16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g	16	99.85%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2008** (line 10c, column (f) divided by line 13, column (f))	17	0.13%
18 Investment income percentage from **2007** Schedule A, Part IV-A, line 27h	18	0.15%

19a **33 1/3% support tests - 2008.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☒

b **33 1/3% support tests - 2007.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here** The organization qualifies as a publicly supported organization ▶ ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ ☐

Part IV **Supplemental Information.** Complete this part to provide the explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. (see instructions)

SCHEDULE G
(Form 990 or 990-EZ)
Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

▶ Attach to Form 990 or Form 990-EZ. Must be completed by organizations that answer "Yes" to Form 990, Part IV, lines 17, 18, or 19, and by organizations that enter more than $15,000 on Form 990-EZ, line 6a.

OMB No 1545-0047

2008

Open To Public Inspection

Name of the organization
SOUTHWEST FOUNDATION FORUM

Employer identification number
23-7080207

Part I **Fundraising Activities.** Complete if the organization answered "Yes" to Form 990, Part IV, line 17.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply

a ☐ Mail solicitations
b ☐ Email solicitations
c ☐ Phone solicitations
d ☐ In-person solicitations
e ☐ Solicitation of non-government grants
f ☐ Solicitation of government grants
g ☒ Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising activities? ☐ Yes ☒ No

b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization Form 990-EZ filers are not required to complete this table.

(i) Name of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions? Yes	(iii) No	(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
Total ▶						

3 List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing.

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule G (Form 990 or 990-EZ) 2008

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Part II **Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than $15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than $5,000.

		(a) Event #1 SWFF GALA (event type)	(b) Event #2 LUNCHEONS (event type)	(c) Other Events NONE (total number)	(d) Total Events (Add col (a) through col (c))
Revenue	1 Gross receipts	279,406.	13,343.		292,749.
	2 Less Charitable contributions				
	3 Gross revenue (line 1 minus line 2)	279,406.	13,343.		292,749.
Direct Expenses	4 Cash prizes				
	5 Non-cash prizes				
	6 Rent/facility costs	19,420.			19,420.
	7 Other direct expenses	84,914.	9,597.		94,511.
	8 Direct expense summary. Add lines 4 through 7 in column (d) ▶				(113,931.)
	9 Net income summary. Combine lines 3 and 8 in column (d) ▶				178,818.

Part III **Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than $15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (Add col. (a) through col (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Non-cash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes ____% ☐ No	☐ Yes ____% ☐ No	☐ Yes ____% ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) ▶				( )
	8 Net gaming income summary. Combine lines 1 and 7 in column (d) ▶				

			Yes	No
9	Enter the state(s) in which the organization operates gaming activities			
a	Is the organization licensed to operate gaming activities in each of these states?	9a		
b	If "No," Explain			
10a	Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?	10a		
b	If "Yes," Explain			
11	Does the organization operate gaming activities with nonmembers?	11		
12	Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?	12		

				Yes	No
13	Indicate the percentage of gaming activity operated in:				
a	The organization's facility	13a	%		
b	An outside facility	13b	%		
14	Provide the name and address of the person who prepares the organization's gaming/special event books and records				
	Name ▶ _____				
	Address ▶ _____				
15a	Does the organization have a contract with a third party from whom the organization receives gaming revenue?		15a		
b	If "Yes," enter the amount of gaming revenue received by the organization ▶ $ _____ and the amount of gaming revenue retained by the third party ▶ $ _____				
c	If "Yes," enter name and address				
	Name ▶ _____				
	Address ▶ _____				
16	Gaming manager information				
	Name ▶ _____				
	Gaming manager compensation ▶ $ _____				
	Description of services provided ▶ _____				
	☐ Director/officer ☐ Employee ☐ Independent contractor				
17	Mandatory distributions				
a	Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?		17a		
b	Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ $				

FORM 990EZ, PART I - INVESTMENT INCOME

DESCRIPTION	AMOUNT
INTEREST INCOME	171.
TOTAL	171.

FORM 990EZ, PART I - SPECIAL EVENTS AND ACTIVITIES

DESCRIPTION	GROSS REVENUE	DIRECT EXPENSES	NET INCOME
ANNUAL GALA:			
RAFFLE/AFTER PARTY TICKETS	34,775.		34,775.
TABLE SALES & GALA GRANT	124,631.		124,631.
DIRECT EXPENSES:			
FLOWERS		12,000.	-12,000.
INVITATIONS/PRINTING		9,249.	-9,249.
RAFFLE/AFTER PARTY EXPENSES		6,974.	-6,974.
RENTALS		19,420.	-19,420.
MAILINGS		2,159.	-2,159.
BANK CHARGES/VISA/MC		2,626.	-2,626.
FOOD		46,526.	-46,526.
ENTERTAINMENT		4,930.	-4,930.
INSURANCE		450.	-450.
TOTALS	159,406.	104,334.	55,072.

FORM 990EZ, PART I - GRANTS AND SIMILAR AMOUNTS PAID
IN EXCESS OF $5000

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
GRANTS PAID			
SOUTHWEST FOUNDATION FOR BIOMEDICAL RESEARCH 7620 LOOP 410 NW SAN ANTONIO, TX 78227	NONE EXEMPT	CHARITABLE	204,779.
		TOTAL CONTRIBUTIONS PAID	204,779.

FORM 990EZ, PART I - OTHER EXPENSES

CREDIT CARD EXPENSES	824.
MEMBERSHIP EXPENSES	1,649.
SPECIAL EVENT EXPENSES	1,154.
OVERHEAD/MISC. EXPENSES	1,284.
LUNCHEON EXPENSES	9,597.
STORAGE UNIT	1,116.
WEBSITE	1,350.
SCIENCE EDUCATION AWARD EXPENSES	526.
TOTAL	17,500.

FORM 990EZ, PART I - OTHER CHANGES IN FUND BALANCES

INCREASES IN FUND BALANCES

PRIOR PERIOD ADJUSTMENT	2,098.
TOTAL	2,098.

FORM 990EZ, PART II - CASH, SAVINGS AND INVESTMENTS

DESCRIPTION	BEGINNING OF YEAR	END OF YEAR
CASH	29,080.	-1,450.
SAVINGS	15,026.	29,071.
TOTALS	44,106.	27,621.

FORM 990EZ, PART II - OTHER ASSETS

DESCRIPTION	BEGINNING OF YEAR	END OF YEAR
POSTAL DEPOSIT	533.	821.
TOTALS	533.	821.

FORM 990EZ, PART III - ORGANIZATION'S PRIMARY EXEMPT PURPOSE

THE PURPOSE OF SOUTHWEST FOUNDATION FORUM IS TO PROVIDE SUPPORT FOR SOUTHWEST FOUNDATION FOR BIOMEDICAL RESEARCH.

FORM 990EZ, PART III - STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTS

PROGRAM SERVICE ACCOMPLISHMENT 2

EXPENSES INCURRED FOR MORE VISIBILITY IN THE COMMUNITY IN ORDER TO INCREASE MEMBERSHIP AND INCOME FOR THE BENEFIT OF SOUTHWEST FOUNDATION FOR BIOMEDICAL RESEARCH. ALSO, SCIENCE EDUCATION AWARDS ARE GIVEN TO AREA SCHOOLS.

FORM 990EZ, PART IV - LIST OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT. AND OTHER ALLOWANCES
LAURA MOORMAN P.O. BOX 6648 SAN ANTONIO, TX 78209	PRESIDENT 1.	NONE	NONE	NONE
TERRY GOUGER P.O. BOX 6648 SAN ANTONIO, TX 78209	1ST VICE PRESIDENT 1.	NONE	NONE	NONE
KAREN LEE ZACHRY P.O. BOX 6648 SAN ANTONIO, TX 78209	2ND VP - GALA CHAIR 1.	NONE	NONE	NONE
SUZANNE M. DABBONS, M.D. P.O. BOX 6648 SAN ANTONIO, TX 78209	3RD VP - GALA CO-CHAIR 1.	NONE	NONE	NONE
MARBYBETH MOSBACKER P.O. BOX 6648 SAN ANTONIO, TX 78209	4TH VP - MEMBERSHIP 1.	NONE	NONE	NONE
JODI WOOD P.O. BOX 6648 SAN ANTONIO, TX 78209	TREASURER 1.	NONE	NONE	NONE
ANNE HEANER	ASSISTANT TREASURER 1.	NONE	NONE	NONE

FORM 990EZ, PART IV - LIST OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT. AND OTHER ALLOWANCES
P.O. BOX 6648 SAN ANTONIO, TX 78209				
JULIE ZACHER P.O. BOX 6648 SAN ANTONIO, TX 78209	RECORDING SECRETARY 1.	NONE	NONE	NONE
CATHERINE COMEAUX P.O. BOX 6648 SAN ANTONIO, TX 78209	CORRESPONDING SECRETARY 1.	NONE	NONE	NONE
ALLISON ZELLER P.O. BOX 6648 SAN ANTONIO, TX 78209	PAST PRESIDENT - NOMINATING 1.	NONE	NONE	NONE
MARY HERFF P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
LEANNE KELLY P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
HEATHER KRAFT P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE

FORM 990EZ, PART IV - LIST OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT. AND OTHER ALLOWANCES
CATHRYN LE VRIER P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
KRISTIN LEVOYER P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
PAOLA LLOYD P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
AUDREY MANGOLD P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
ROXANNE NEWSOM P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
CAROL OLIVER P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE

FORM 990EZ, PART IV - LIST OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT. AND OTHER ALLOWANCES
COURTNEY PERCY P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
KIMBERLY ARCHER P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
COURTNEY BURKHOLDER P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
MEREDITH CAMPBELL P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
DOTTIE COOPER P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
JENNI CURREN P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
JULIE DUDLEY	TRUSTEE 1.	NONE	NONE	NONE

FORM 990EZ, PART IV - LIST OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT. AND OTHER ALLOWANCES
P.O. BOX 6648 SAN ANTONIO, TX 78209				
DEB FERGUSON P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
JOSIE FLESHER P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
DANA HAMILTON P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
KIM SHEPPERD P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
SHARI STANKEY P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
MICHELE STEVENS P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE

FORM 990EZ, PART IV - LIST OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT. AND OTHER ALLOWANCES
SALLY SULLIVAN P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
AMY WHITE P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
SHANNON WINGROVE P.O. BOX 6648 SAN ANTONIO, TX 78209	TRUSTEE 1.	NONE	NONE	NONE
GRAND TOTALS		NONE	NONE	NONE