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## Form 990-PF

Department of the Treasury

Internal Revenue Service

## Return of Private Foundation

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

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

OMB No 1545-0052 2009

For calendar year 2009, or tax year beginning , and ending Initial return of a former public charity Final return G Check all that apply Initial return Amended return Address change Name change Name of foundation A Employer identification number Use the IRS THE BARBARA ROASTINGEAR AND label. HENRY OLIVER III FAMILY FOUNDATION 20-1518829 Otherwise. print Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number or type. 551 CORDOVA ROAD, #714 505-988-2494 See Specific City or town, state, and ZIP code C If exemption application is pending, check here Instructions. SANTA FE, NM 87505 D 1. Foreign organizations, check here Foreign organizations meeting the 85% test, check here and attach computation H Check type of organization X Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation If private foundation status was terminated I Fair market value of all assets at end of year | J | Accounting method LX | Cash Accrual under section 507(b)(1)(A), check here Other (specify) (from Part II, col. (c), line 16) If the foundation is in a 60-month termination 320,817. (Part I, column (d) must be on cash basis.) ▶\$ under section 507(b)(1)(B), check here Analysis of Revenue and Expenses (d) Disbursements for chantable purposes (cash basis only) (b) Net investment (a) Revenue and (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessanly equal the amounts in column (a)) expenses per books income income 100,000 N/A Contributions, gifts, grants, etc., received Check X if the foundation is not required to attach Sch. B Interest on savings and temporary cash investments 413 413 STATEMENT 3 303. 303 STATEMENT Dividends and interest from securities 5a Gross rents D Net rental income or (loss) 62 Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 0 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain Income modifications  $\widetilde{\Omega}$ c Gross profit of (loss) NOV 19 iRS-O Other incomes 716. 100,716 12 Total Additines 1 through 1 0. 0 0. Compensation of officers turistic 14 Other employee salaries and wages Pension plans, employee benefits 15 Expenses 16a Legal fees STMT 3 983 98 885. **b** Accounting fees c Other professional fees **Administrative** 17 Interest 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings Operating and 22 Printing and publications 23 Other expenses 24 Total operating and administrative 983 98 885. expenses. Add lines 13 through 23 50,810. 50,810 25 Contributions, gifts, grants paid SCANNED No. 2007-10 26 Total expenses and disbursements. 51,793 98 51,695. Add lines 24 and 25 Subtract line 26 from line 12 48,923 3 Excess of revenue over expenses and disbursements 618 b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-)

09351115 769177 2296

Form 9902PF (2009)

HENRY OLIVER III FAMILY FOUNDATION

20-1518829 Page 2

Te de	)   	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	f year
	arı	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	271,894.	320,817.	320,817.
	3	Accounts receivable -			
		Less allowance for doubtful accounts			
	4	Pledges receivable			
		Less allowance for doubtful accounts			
	5	Grants receivable			<del> </del>
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
	7	Other notes and loans receivable			
		Less allowance for doubtful accounts			
ş	8	Inventories for sale or use			_
Assets	9	Prepaid expenses and deferred charges			
⋖	10a	Investments - U S and state government obligations			
	b	Investments - corporate stock			
	C	Investments - corporate bonds			W-11-11-11-11-11-11-11-11-11-11-11-11-11
	11	Investments - land, buildings, and equipment basis			
		Less. accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment basis			
		Less. accumulated depreciation			
	15	Other assets (describe			
		<b>-</b>	271 004	220 017	220 017
_	_	Total assets (to be completed by all filers)	271,894.	320,817.	320,817.
	I	Accounts payable and accrued expenses			
	18	Grants payable			
Liabilities	19	Deferred revenue			
Ē	20	Loans from officers, directors, trustees, and other disqualified persons			
Ë	21	Mortgages and other notes payable  Other liabilities (describe ▶ )			
	22	Other habilities (describe			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
_	23	Foundations that follow SFAS 117, check here	•		
		and complete lines 24 through 26 and lines 30 and 31.			
ès	24	Unrestricted			
Net Assets or Fund Balance	25	Temporarily restricted			
Bal	1	Permanently restricted			
P		Foundations that do not follow SFAS 117, check here			
Ē		and complete lines 27 through 31			
S	27	Capital stock, trust principal, or current funds	0.	0.	
set	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
As	29	Retained earnings, accumulated income, endowment, or other funds	271,894.	320,817.	
Š	30	Total net assets or fund balances	271,894.	320,817.	
	31	Total liabilities and net assets/fund balances	271,894.	320,817.	
P	art	Analysis of Changes in Net Assets or Fund B	alances		
=				<del></del>	
1		net assets or fund balances at beginning of year - Part II, column (a), line	30		071 004
(must agree with end-of-year figure reported on prior year's return)					271,894.
2 Enter amount from Part I, line 27a			•	. 2	48,923.
		rincreases not included in line 2 (itemize)	3	220 917	
		ines 1, 2, and 3	4	320,817.	
		eases not included in line 2 (itemize)	Jump (h) Iv : 00	5	220 917
<u>p</u>	rotal	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	owmn (b), line 30		320,817.

Part IV Capital Gains and	Losses for Tax on Inv	estmen	t Income						
	e kınd(s) of property sold (e g , r se, or common stock, 200 shs N		·	P	How ace - Purch - Dona	iase	( <b>c)</b> Date a (mo , da		(d) Date sold (mo , day, yr )
1a									
b NONE		_							
<u>C</u>	···	-	<del></del>						
<u>d</u>									<del></del>
e	(f) Depreciation allowed	(n) Cos	st or other basis				/h) Ga	ın or (loss)	
(e) Gross sales price	(or allowable)		expense of sale					(f) minus (	
<u>a</u>									
<u>b</u>		<del></del>							
d d									
e									· -
Complete only for assets showing gain	in column (h) and owned by the	e foundation	on 12/31/69					ol (h) gain	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	٠,,	cess of col (i) col (j), if any			col		ot less than from col (f	
a									
b									
<u>c</u>									
d									
0	C 16 may 1 m 1 m 1 m 1 m 1 m 1 m 1 m 1 m 1 m 1	. D. A.I. I	<del></del>	7	1				
2 Capital gain net income or (net capital lo	(ss) $ \begin{cases} \text{ If gain, also enter in} \\ \text{ If (loss), enter -0- in} \end{cases} $			<b> </b>	2				
3 Net short-term capital gain or (loss) as of gain, also enter in Part I, line 8, column if (loss), enter -0- in Part I, line 8		(6)		}	2				
Part V Qualification Under	Section 4940(e) for R	Reduced	Tax on Net	Inv	estm	ent Inco	me		
(For optional use by domestic private found	ations subject to the section 494	40(a) tax on	net investment in	come	<del>)</del>	•			
If section 4940(d)(2) applies, leave this par	hlank								
Was the foundation liable for the section 49		• •	•	riod?					Yes X No
If "Yes," the foundation does not qualify und  Enter the appropriate amount in each c				es					
(a)	(b)		Thatting any onto	(c)				5	(d)
Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distrib	butions	Net value of no						útión ratio ded by col. (c))
2008		,876.				0,887.			.076711
2007		,200.				3,121	·		.184706
2006	5	<u>,000.</u>			26	5,626	<u>-</u>		.187786
<u>2005</u> 2004								_	
2004							1		
2 Total of line 1, column (d)							2		.449203
3 Average distribution ratio for the 5-year	base period - divide the total on	line 2 by 5,	or by the number	of ye	ars				
the foundation has been in existence if t	ess than 5 years	-					3		.149734
4 Enter the net value of noncharitable-use	assets for 2009 from Part X, line	e 5					4		249,621.
5 Multiply line 4 by line 3				5		37,377.			
6 Enter 1% of net investment income (1%	of Part I, line 27b)						6		6.
7 Add lines 5 and 6							7		37,383.
8 Enter qualifying distributions from Part	(II, line 4						8		51,695.
if line 8 is equal to or greater than line 7 See the Part VI instructions	check the box in Part VI, line 1b	o, and comp	lete that part usin	g a 19	% tax ra	ite			

Pa	irt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4940	3 - see i	nstru	ctio	ns)
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 X and enter 1%	1			6.
	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)				
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	!			0.
3	3 Add lines 1 and 2				
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	,			0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			_	6.
6	Credits/Payments				
а	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 42.				
	Exempt foreign organizations - tax withheld at source				
C	Tax paid with application for extension of time to file (Form 8868)				
	Backup withholding erroneously withheld 6d				
7	Total credits and payments Add lines 6a through 6d	. ]			42.
8		,			
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed				
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid				36.
11	Enter the amount of line 10 to be Credited to 2010 estimated tax ▶ 36 . Refunded ▶ 11	1			0.
Pa	rt 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			Yes	No
	any political campaign?		1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?		1b		X
	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				
C	Did the foundation file Form 1120-POL for this year?	(	10		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year				
	(1) On the foundation $\blacktriangleright$ \$ 0 . (2) On foundation managers $\blacktriangleright$ \$				
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation				
	managers > \$O .				
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?					X
	If "Yes," attach a detailed description of the activities				
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or					
bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes					X
4a	4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?				
b	If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	4b		
5	5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?				X
	If "Yes," attach the statement required by General Instruction T				
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		X
7	Did the foundation have at least \$5,000 in assets at any time during the year?	ļ	7	X	<u> </u>
	If "Yes," complete Part II, col. (c), and Part XV.	1			
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)  NM				
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					
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				Х	
year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV					X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		9 10		X
		Forr	n 990	-PF	(2009)

<b>p</b> a	irt 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)					
12	2 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before					
	August 17, 2008?					
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X			
	Website address ► N/A					
14	The books are in care of ► MR. & MRS. HENRY OLIVER III Telephone no ►505-98		494			
	Located at ► 551 CORDOVA ROAD, #714, SANTA FE, NM ZIP+4 ►87	505				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		<b>•</b>			
	and enter the amount of tax-exempt interest received or accrued during the year	N.	/A_			
Pa	rt 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			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?					
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)					
	a disqualified person?		1			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?					
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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)?					
	(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 )					
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations		1			
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?  N/A	1b				
_	Organizations relying on a current notice regarding disaster assistance check here		1			
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			Х		
•	before the first day of the tax year beginning in 2009?	1c				
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)) At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning					
a	before 2009? Yes X No					
	If "Yes," list the years ▶					
h	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect					
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach					
	statement - see instructions )  N/A	2b	1			
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here					
•	The provisions of section to relaying approach and yours noted in early section yours noted.					
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 2009 as a result of (1) any purchase by the foundation or disqualified persons after		- 1			
	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		1			
	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,		1			
	Form 4720, to determine if the foundation had excess business holdings in 2009)	3b	]			
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X		
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that					
	had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		<u>X</u>		
		n <b>990</b> .	-PF (	2009)		

HENRY	OLIVER	III	FAMILY	FOUNDATION

Part VII-B   Statements Regarding Activities for Which I	Form 4720 May Be F	Required (contin	ued)		
•5a During the year did the foundation pay or incur any amount to					
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	es X No				
(2) Influence the outcome of any specific public election (see section 4955), o	r to carry on, directly or indire				
any voter registration drive?			es X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	Ye	s X No			
(4) Provide a grant to an organization other than a charitable, etc., organization	(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)?		Ye	es X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f				
the prevention of cruelty to children or animals?			es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und		n Regulations	37./3		
section 53 4945 or in a current notice regarding disaster assistance (see instru	•		N/A	5b	<del> </del>
Organizations relying on a current notice regarding disaster assistance check h					
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi			l		
expenditure responsibility for the grant?		I/A	es 🔲 No 📗		
If "Yes," attach the statement required by Regulations section 53.494					
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on		es X No		
a personal benefit contract?		<b>TE</b>	S LA NO	6.	х
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal denent contract?		}	6b	
If "Yes" to 6b, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax s	holter transaction?		s X No		
b If yes, did the foundation receive any proceeds or have any net income attribute			N/A	7b	
Information About Officers Directors Trust		nagers Highly		70	
Part VIII Paid Employees, and Contractors	ooo, i oundation ma	inagoro, riigini,	•		
List all officers, directors, trustees, foundation managers and their	compensation.				
A.N. Norman and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans and deferred	(e)	Expense unt, other
(a) Name and address	to position	enter -0-)	and deterred compensation	allo	wances
	PRESIDENT				
551 W CORDOVA RD #714			_		
SANTA FE, NM 87505	1.00	0.	0.		0.
	VICE PRESIDEN	Tr .		-	
551 W CORDOVA RD #714	1 00				•
SANTA FE, NM 87505	1.00	0.	0.	<u> </u>	0.
	DIRECTOR			1	
551 W CORDOVA RD #714	0 00		_	İ	^
SANTA FE, NM 87505	0.00	0.	0.	<u> </u>	0.
				!	
Compensation of five highest-paid employees (other than those inc	luded on line 1). If none,	enter "NONE."		Д	_
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(a) Components	(d) Contributions to employee benefit plans	(e)	Expense unt, other
(a) Name and address of each employee paid more than \$50,000	devoted to position	(c) Compensation	and deterred compensation	acco	wances
NONE	•				
		-			
				<u> </u>	
				<del> </del>	
Catal number of other employees and ever \$50,000		<u> </u>	<u> </u>		0
Total number of other employees paid over \$50,000			Form	990-5	F (2009)

3 Five highest-paid independent contractors for professional services. If none, ente	r "NONE."	<del>_</del>
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	7	
Total number of others receiving over \$50,000 for professional services		<b>&gt;</b> (
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statis	tical information such as the	_
number of organizations and other beneficiaries served, conferences convened, research papers produced		Expenses
1 N/A		
2		
3		
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2	Amount
1 N/A		
		<u>,</u>
2		
All other program-related investments See instructions		
3		
Total. Add lines 1 through 3	<b>&gt;</b>	0.

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		<del></del>
a	Average monthly fair market value of securities	1a	0.
	Average of monthly cash balances	1b	0. 253,422.
	Fair market value of all other assets	10	· · · · · · · · · · · · · · · · · · ·
d	Total (add lines 1a, b, and c)	1d	253,422.
е	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	253,422.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,801.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	249,621.
6	Minimum investment return. Enter 5% of line 5	6	12,481.
P	postributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part )	d certain	-
1	Minimum investment return from Part X, line 6	1	12,481.
2a			
b	Income tax for 2009 (This does not include the tax from Part VI )		
C	Add lines 2a and 2b	2c	6.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	12,475.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	12,475.
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	12,475.
=	art XII Qualifying Distributions (see Instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		E1 C0E
a	, , , , , , , , , , , , , , , , , , ,	1a	51,695. 0.
	Program-related investments - total from Part IX-B	1b	<u> </u>
2	Amounts paid to acquire assets used (or held for use) directly in carrying out chantable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	· · · · · · · · · · · · · · · · · · ·	3a	
	Cash distribution test (attach the required schedule)	3b	E1 (0E
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	51,695.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		6
_	income Enter 1% of Part I, line 27b	5	51 600
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	51,689.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years	<sub>l</sub> ualifies fo	r the section

Form **990-PF** (2009)

Part XIII Undistributed Income (see Instructions)

Tart Affi		- · · · · · · · · · · · · · · · · · · ·		
	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				12,475.
2 Undistributed income, if any, as of the end of 2009				· · · · · · · · · · · · · · · · · · ·
a Enter amount for 2008 only			0.	
b Total for prior years				
,		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004	1			
<b>b</b> From 2005				
¢ From 2006				
d From 2007 12,629.				
e From 2008 4,905.	į			
1 Total of lines 3a through e	17,534.			
4 Qualifying distributions for 2009 from				
Part XII, line 4 $\triangleright$ \$ 51,695.				
a Applied to 2008, but not more than line 2a			0.	
<b>b</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.			10 155
d Applied to 2009 distributable amount	20.000			12,475.
e Remaining amount distributed out of corpus	39,220.			
5 Excess distributions carryover applied to 2009 (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	56,754.			
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 2008. Subtract line				
4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract				
lines 4d and 5 from line 1 This amount must				^
be distributed in 2010				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by	_	ļ		
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004	0.			
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010.	56,754.			
Subtract lines 7 and 8 from line 6a	30,734.			
A nalysis of line 9	1			
a Excess from 2005				
b Excess from 2006 c Excess from 2007 12,629.				
d Excess from 2008 4,905.				
e Excess from 2009 39,220.				
0 EA0033 HUIII 2003   0.7 / 2.2 0 •	<del> </del>			5 - 000 DE (0000)

_	XIV Private Operating F	OUNDATIONS (See Ins			N/A	1310023 rage 10
				A, question 9)	N/A	
	the foundation has received a ruling of					
	oundation, and the ruling is effective for			<b>▶</b> ∟	4040(1)(2) 25	1 4040(1)(5)
	heck box to indicate whether the found		ig foundation described i	Prior 3 years	4942(j)(3) or	4942(J)(5)
	nter the lesser of the adjusted net	Tax year (a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
	come from Part I or the minimum	(a) 2003	(1) 2000	(6) 2007	(4) 2000	(6) 10(2)
	evestment return from Part X for					
	ach year listed	-				
	5% of line 2a					<del></del>
	ualifying distributions from Part XII,					
	ne 4 for each year listed					
	mounts included in line 2c not					
	sed directly for active conduct of					
	xempt activities					
	ualifying distributions made directly					
	or active conduct of exempt activities					1
	ubtract line 2d from line 2c omplete 3a, b, or c for the					
	Iternative test relied upon					
a "/	Assets" alternative test - enter					
(1	Value of all assets					
(2	<ol> <li>Value of assets qualifying under section 4942(j)(3)(B)(i)</li> </ol>					
	ndowment" alternative test - enter					
S	/3 of minimum investment return hown in Part X, line 6 for each year sted					
c "S	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	2) Support from general public					
	and 5 or more exempt organizations as provided in					
	section 4942(j)(3)(B)(iii)					
(3	3) Largest amount of support from					
	an exempt organization					
(4	Gross investment income					
Part	XV Supplementary Info			if the founda	tion had \$5,000 or	more in assets
	at any time during t	he year-see the i	nstructions.)			
1 Ir	nformation Regarding Foundatio	n Managers:				
	ist any managers of the foundation who			ributions received t	by the foundation before the	close of any tax
-	ear (but only if they have contributed m	nore than \$5,000) (See s	ection 507(d)(2) )			
NON:						
	ist any managers of the foundation who			or an equally large	portion of the ownership of	a partnership or
	ther entity) of which the foundation has	s a +0 /0 or greater interes	ot .			
NON:						
	nformation Regarding Contributi					
	heck here $ ightharpoonup oxed{X}$ if the foundation one foundation makes gifts, grants, etc. (					
			<del>-</del>		ms, complete items 2a, b, c,	ano u
a T	he name, address, and telephone numl	per of the person to whor	n applications should be	addressed		
b Т	he form in which applications should b	e submitted and informat	ion and materials they sh	ould include	· ·	
	ny submission deadlines			·		
υ A	ny sabimasion deadimes					
d A	ny restrictions or limitations on awards	s, such as by geographica	ıl areas, chantable fields,	kınds of ınstitution	s, or other factors	

HENRY OLIVER III FAMILY FOUNDATION

20-1518829 Page 11

Part XV Supplementary Information	(continued)			
3 Grants and Contributions Paid During the Ye	ear or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	status of recipient	Contribution	7
Name and address (home or business)  a Paid during the year	or substantial contributor	recipient	CONTRIBUTION	
SEE STATEMENT 4				FO 010
Total  b Approved for future payment		<u> </u>	<b>▶</b> 3a	50,810.
NONE				
		L	<b>.</b>	
			► 3b	0.

923611 02-02-10

Form 990-PF (2009)

Δ.	Analysis o	f Income	-Producing	Activities

Enter gross amounts unless otherwise indicated	Unrelated b	Unrelated business income		y section 512, 513, or 514	(e)
· ·	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue	code	Amount	code	Amount	function income
a					
b	1 1				
C	1 1				
d	1 1				
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			14	413.	
4 Dividends and interest from securities	İ		14	303.	
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					
O Gross profit or (loss) from sales of inventory					
1 Other revenue					
a					
b					,
C	1 1		$\bot$		
d					
e			<del>.                                     </del>	716	
2 Subtotal Add columns (b), (d), and (e)	<u> </u>		).	716.	
3 Total. Add line 12, columns (b), (d), and (e)				13	/ 10
See worksheet in line 13 instructions to verify calculate	ons )				
Part XVI-B Relationship of Activi	ties to the Accom	plishment of	Exempt Po	ırposes	
Line No. Explain below how each activity for while the foundation's exempt purposes (other			I-A contributed	importantly to the accomp	lishment of

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)

923621 02-02-10

Part XVII  Information Regarding Transfers To and Transactions and Relationships With Noncharitable	_				FAMILY FOUNDATIO		018829	Pa	ge 13
1 Did the organization directly or inducedly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)) organizations) or in section 527, relating to political organizations?  1 Transfers from the reporting foundation to a monchantable exempt organization of (1) Cash (2) Other assets  1 Did the resease of assets from a nonchantable exempt organization  (2) Purchases of assets from a nonchantable exempt organization  (3) Sental of facilities, equipment, or other assets  (4) Reimbursement arrangements  (5) Issas or from quarantees  (6) Pardimanus of services or membership or fundrating solicitations  (7) Share of activities, equipment, or other assets  (8) Partimanus of services or membership or fundrating solicitations  (9) Partimanus of services or membership or fundrating solicitations  (9) Partimanus of services or membership or fundrating solicitations  (9) Partimanus of services or or membership or fundrating solicitations  (9) Partimanus of services or or membership or fundrating solicitations  (9) Partimanus of services or or membership or fundrating solicitations  (9) Partimanus of services or or membership or fundrating solicitations  (9) Partimanus of services or or membership or fundrating solicitations  (9) Partimanus of services or or membership or fundrating solicitations  (9) Partimanus of services or or membership or fundrating solicitations  (10) Partimanus of services or or membership or fundrating solicitations  (10) Partimanus of services or or services or membership or fundrating solicitations  (10) Partimanus of services or or services		art A			s To and Transactions an	d Relationships With Nonc	haritable		
the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?  1 Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets (3) States of assets from a noncharitable exempt organization (1) States of assets from a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (3) Loans or from guarantees (3) Rental or facilities, equipment, or other assets (3) Loans or from guarantees (4) Reminuscement a rrangements (5) Loans or from guarantees (6) Performance of services or membership or fundrasing solicitabions (6) Loans or from guarantees (7) Amount involved (8) the assets, or pad employees (8) If the answer to any of the above is "Yes," complete the following schedulin Column (b) should always show the fair market value of the goods, other assets, or services received (8) Lince no (9) Amount involved (1) Remain of noncharitable exempt organization (1) Should always show the fair market value of the goods, other assets, or services received (8) Lince no (9) Amount involved (2) Rame of noncharitable exempt organization (1) Decemptor of reactions, and ahaving amenginments  2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organization or sharing arrangement, show in column (c) the value of the goods, other assets, or services precised  (a) Lince no (9) Amount involved (2) Rame of noncharitable exempt organization (1) Decemptor of reactions, and ahaving amenginments  N/A  Under permitting displaying, I declare toat I have examined this return, including accompanying scheduline and statements, and to the best of my houndedge and belief, it is time, common, and the common of the process of the process of the process of the statement of the process of the process of the process of the process of the process of the process of the process of the process of the process of the process of	1	Did th			ollowing with any other organization	described in section 501(c) of		/ac	No
a Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets (3) Cash (	•				•	· ·			-110
(2) Clash (2) Other sasets to a noncharitable exempt organization (1) Sales of assets from a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of Societies, equipment, or other assets (6) Loans or loan guarantees (6) Loans or loan guarantees (7) Performance of services or membership or fundracing solectations (8) Performance of services or membership or fundracing solectations (8) Performance of services or membership or fundracing solectations (9) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or membership or fundracing solectations (1) Performance of services or	i		•		• •				
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N/A  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?  If Yes, complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of jetings, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and behel, it is true, correct, and demolified professionable of preparer (bits than tax payer or foliosary) is based on all information of which preparer has any knowledge  Signature of officers frustee  Date  Preparer's  Preparer's  Preparer's John School of Preparer's identifying number stignature  Title  Preparer's identifying number stignature  Preparer's identifying number of the control o						, , , , , ,	·		
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?  b. if "Yes," complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  Under penalties of despise, I declare that I have examined this ratum, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and confidence of preparer following schedules and all information of which preparer has any localisation  Signature of officers it trustee  Date  Title  Check II  Preparer's identifying number signature  Preparer's production of the College of the Check II  Intervalve of the College of the Check II  Intervalve of the Check II  Intervalve of Check	(a)	Line no	(b) Amount involved	(c) Name of noncha	aritable exempt organization	(d) Description of transfers, transactions,	and shanng arra	ngeme	nts
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No				N	/A	<u> </u>			
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No						-			
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No			*****						
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No			··· ··· ··· ··· ···						
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?    Yes   X   No									
b If Yes, complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of sequiny, 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 preclaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge  Signature of officer or trustee  Date  Preparer's identifying number signature  Firm's name (or yours is self-semployed).  Probably Characteristics of self-semployed is self-semployed.  Preparer's identifying number self-self-semployed.  EIN	2 a					ions described			_
(a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of panyry, 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 penalties of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge and belief, it is true, correct, and complete penalties of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge and belief, it is true, correct, and complete penalties of preparer's identifying number of fittle  Preparer's identifying number self-employed.  Preparer's identifying number is self-employed.  Preparer's identifying number is self-employed.  Preparer's identifying number is self-employed.  Preparer's identifying number is self-employed.  Preparer's identifying number is self-employed.  Preparer's identifying number is self-employed.					ın section 527?		Yes	X	No
Under penalties of earning, 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 or fiduciary) is based on all information of which preparer has any knowledge    Visit   V	t	If "Yes							
Under penalties of penury, 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 or fiduciary) is based on all information of which preparer has any knowledge    Vool-10				anization	(b) Type of organization	(c) Description of relati	onship		
and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge    Volume			N/A	<del></del>					
and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge    Volume				<del></del>		· -			
and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge    Volume	-								
and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge    Volume	_								
and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge    Volume	7	Under p	enalties of genury. I declare that I h	ave examined this return, include	no accompanying schedules and statement	ts and to the best of my knowledge and belief	it is true correct		
Preparer's signature  Preparer's Signature  Preparer's Manager Company	ł						it is tide, contect	•	
Preparer's signature  Preparer's Signature  Preparer's Manager Company			Manna M	1,50	1/201510	PIOI			
Preparer's signature  Preparer's Signature  Preparer's Manager Company	9	र्डा	nature of officer or trustee		Date Date	Titla -			
Signature Signa	2		·	. 0 11	· - · · · · · · · · · · · · · · · · · ·	Check if   Pre	parer's identifyir	g num	ber
Firm's name (or yours   FOLLINGSTAD & GRASSHAM, CPA LLC   EIN    P.O. BOX 6080   Phone no (505) 988-5564	틹	تر ک	· •	and K Dia		self-			
P.O. BOX 6080 SANTA FE, NEW MEXICO 87502-6080 Phone no (505)988-5564	<u>ا</u> "	oa g	EOLL	INGSTAD & GR					
address, and ZIP code SANTA FE, NEW MEXICO 87502-6080 Phone no (505)988-5564	ĺ	rep Jse			Jimir CIN DDC	Eliv	<del></del>		
		م م			XICO 87502-6080	Phone no (50	5)988-	556	54

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FORM 990-PF INTEREST ON SAVI	INGS AN	ND TEM	PORARY	CASH	IN	VESTMENTS	STATE	MENT	1
SOURCE							AM	OUNT	
WELLS FARGO								4	13.
TOTAL TO FORM 990-PF, PART I,	LINE	3, CO	LUMN A					4	13.
FORM 990-PF DIVIDEND	OS AND	INTER	EST FR	OM SE	CUR	ITIES	STATE	MENT	2
SOURCE		GROSS	AMOUN'			TAL GAINS VIDENDS		MN (A)	)
WELLS FARGO			30	3.		0.	303.		03.
TOTAL TO FM 990-PF, PART I, I	LN 4 =	303.			0.	303.		03.	
FORM 990-PF	ACC	COUNTI	NG FEE	S			STATE	MENT	3
DESCRIPTION	EXPEN				ADJUSTED	CHARITABI			
	-	983.		98	B.			88	85.
TO FORM 990-PF, PG 1, LN 16B		983.		98	3.	· · ·		88	85.

	AND CONTRIBUTIONS DURING THE YEAR	STATE	EMENT 4
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
SANTA FE RECOVERY CENTER 4100 LUCIA LANE SANTA FE, NM 87507	GENERAL OPERATING	501 (C)(3)	3,000.
KITCHEN ANGELS 1222 SILER ROAD SANTA FE, NM 87507	GENERAL OPERATING	501 (C)(3)	2,500.
NATIVE SEEDS/SEARCH 3584 E RIVER ROAD TUCSON, AZ 85718	GENERAL OPERATING	501 (C)(3)	500.
NEGATIVE POPULATION GROWTH 2861 DUKE STREET, SUITE 36 ALEXANDRIA, VA 22314	GENERAL OPERATING	501 (C)(3)	250.
THE QUIVIRA COALITION 1413 2ND STREET STE #1 SANTA FE, NM 87505	GENERAL OPERATING	501 (C)(3)	24,000.
AVIATION ASSOCIATION OF SANTA FE 121 AVIATION DR #14 SANTA FE, NM 87507	GENERAL OPERATING AND EVENT	501 (C)(3)	9,760.
HUMAN SYSTEMS RESEARCH PO DRAWER 728 LAS CRUCES, NM 88004	GENERAL OPERATING	501 (C)(3)	2,500.
KNME 1130 UNIVERSITY BLVD NE ALBUQUERQUE, NM 87102	GENERAL OPERATING	501 (C)(3)	500.

THE BARBARA ROASTINGEAR AND HEN	RY OLIVER		2	0-1518829
INTERNATIONAL WOW 37 GRAND AVE, THIRD FL BROOKLYN, NY 11205	GENERAL OPERATING	501	(C)(3)	1,000.
THE FOOD DEPOT 1222 SILER RD SANTA FE, NM 87507	GENERAL OPERATING	501	(C)(3)	800.
CHILDREN'S HOME OF PITTSBURGH 5324 PENN AVE PITTSBURGH, PA 15224	GENERAL OPERATING	501	(C)(3)	5,000.
THE SMILE TRAIN PO BOX 96231 WASHINGTON, DC 20090	GENERAL OPERATING	501	(C)(3)	500.
SCHOOL OF ADVANCED RESEARCH PO BOX 2188 SANTA FE, NM 87504	GENERAL OPERATING	501	(C)(3)	500.
TOTAL TO FORM 990-PF, PART XV, LI	NE 3A			50,810.