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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning , and ending

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

Use the IRS label Otherwise, print or type. See Specific Instructions.	Name of foundation BAUMBERGER ENDOWMENT		A Employer identification number 23-7225925
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number (210) 822-8915
	City or town, state, and ZIP code SAN ANTONIO, TX 78209		C If exemption application is pending, check here ☐
			D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 26,668,770. (Part I, column (d) must be on cash basis)		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
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		732,195.	732,195.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		-529,578.			
b Gross sales price for all assets on line 6a		5,210,784.			
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)					
11 Other income		449.	449.		STATEMENT 2
12 Total. Add lines 1 through 11		203,066.	732,644.		
13 Compensation of officers, directors, trustees, etc		17,850.	8,925.		8,925.
14 Other employee salaries and wages		121,734.	6,087.		115,647.
15 Pension plans, employee benefits		39,359.	1,968.		37,390.
16a Legal fees STMT 3		44.	24.		20.
b Accounting fees STMT 4		17,255.	9,490.		7,765.
c Other professional fees STMT 5		59,858.	59,858.		0.
17 Interest					
18 Taxes STMT 6		18,538.	9,777.		35.
19 Depreciation and depletion		1,390.	139.		
20 Occupancy		23,088.	2,309.		20,779.
21 Travel, conferences, and meetings					
22 Printing and publications		4,410.	441.		3,969.
23 Other expenses STMT 7		41,566.	1,150.		40,416.
24 Total operating and administrative expenses. Add lines 13 through 23		345,092.	100,168.		234,946.
25 Contributions, gifts, grants paid		1,012,939.			1,012,939.
26 Total expenses and disbursements. Add lines 24 and 25		1,358,031.	100,168.		1,247,885.
27 Subtract line 26 from line 12		-1,154,965.			
a Excess of revenue over expenses and disbursements			632,476.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash - non-interest-bearing	14,091.	15,658.	15,658.
	2	Savings and temporary cash investments	268,209.	583,688.	583,688.
	3	Accounts receivable ▶ 1,616.			
		Less allowance for doubtful accounts ▶	1,827.	1,616.	1,616.
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons			
	7	Other notes and loans receivable ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	40,742.	22,016.	22,016.
	10a	Investments - U S and state government obligations			
	b	Investments - corporate stock STMT 9	12,191,890.	10,657,761.	11,687,304.
	c	Investments - corporate bonds STMT 10	4,442,500.	3,397,466.	3,629,263.
11	Investments - land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶				
12	Investments - mortgage loans STMT 11	2,393,215.	2,381,697.	2,506,681.	
13	Investments - other STMT 12	6,960,998.	8,098,457.	8,219,408.	
14	Land, buildings, and equipment basis ▶ 26,369.				
	Less accumulated depreciation STMT 13 ▶ 23,233.	4,526.	3,136.	3,136.	
15	Other assets (describe ▶ MINERAL INTEREST)	1.	1.	0.	
16 Total assets (to be completed by all filers)			26,317,999.	25,161,496.	26,668,770.
Liabilities	17	Accounts payable and accrued expenses	1,539.	1.	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable			
	22	Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)		1,539.	1.	
	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			
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	0.	0.	
28	Paid-in or capital surplus, or land, bldg , and equipment fund	0.	0.		
29	Retained earnings, accumulated income, endowment, or other funds	26,316,460.	25,161,495.		
30	Total net assets or fund balances	26,316,460.	25,161,495.		
31	Total liabilities and net assets/fund balances	26,317,999.	25,161,496.		

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	26,316,460.
2 Enter amount from Part I, line 27a	2	-1,154,965.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	25,161,495.
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	25,161,495.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
b JANUS HI YIELD LITIGATION PROCEEDS	P		02/28/09
c AIG LITIGATION PROCEEDS	P		07/31/09
d CAPITAL GAINS DIVIDENDS			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 5,207,225.		5,740,362.	-533,137.
b 489.			489.
c 856.			856.
d 2,214.			2,214.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(j) FMV as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (j) over col. (k), if any	
a			-533,137.
b			489.
c			856.
d			2,214.
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	-529,578.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	{ If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 }	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see 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))
2008	1,528,456.	28,354,266.	.053906
2007	1,072,347.	31,528,975.	.034011
2006	973,037.	29,329,707.	.033176
2005	910,825.	28,023,732.	.032502
2004	945,836.	27,343,894.	.034590

2 Total of line 1, column (d)	2	.188185
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	.037637
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	23,862,927.
5 Multiply line 4 by line 3	5	898,129.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,325.
7 Add lines 5 and 6	7	904,454.
8 Enter qualifying distributions from Part XII, line 4	8	1,247,885.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	6,325.
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	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	6,325.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	6,325.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	22,016.	
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	22,016.	
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	15,691.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax ☐ 10,000. Refunded ☒	11	5,691.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ 0. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ TX		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 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		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ► BAUMBERGERENDOWMENT.COM

14 The books are in care of ► CYNDE ZIETLOW, EXECUTIVE DIRECTOR Telephone no ► (210) 822-8915
 Located at ► 7201 BROADWAY, SUITE 300, SAN ANTONIO, TX ZIP+4 ► 78209

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐
 and enter the amount of tax-exempt interest received or accrued during the year ► 15 | N/A

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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1b	X
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 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☒ Yes ☐ No If "Yes," list the years ► <u>2008</u>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
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 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 2009) <u>N/A</u>	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	X

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

5a During the year did the foundation pay or incur any amount to

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

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☒ Yes ☐ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

X

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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?

N/A

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.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 14		17,850.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CYNTHIA GUYON - 7201 BROADWAY, SUITE 300, SAN ANTONIO, TX 78209	EXECUTIVE DIRECTOR	66,000.	19,617.	0.

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

▶ 0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	23,529,284.
b	Average of monthly cash balances	1b	697,038.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	24,226,322.
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	24,226,322.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	363,395.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	23,862,927.
6	Minimum investment return. Enter 5% of line 5	6	1,193,146.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part)

1	Minimum investment return from Part X, line 6	1	1,193,146.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	6,325.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	6,325.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,186,821.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,186,821.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,186,821.

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	1,247,885.
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	1,247,885.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	6,325.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,241,560.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				1,186,821.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			1,407,246.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 1,247,885.				
a Applied to 2008, but not more than line 2a			1,247,885.	
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 2009 distributable amount				0.
e Remaining amount distributed out of corpus	0.			
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	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			159,361.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				1,186,821.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT 15				
Total				▶ 3a 1,012,939.
b Approved for future payment				
NONE				
Total				▶ 3b 0.

Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	732,195.	
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			14	449.	
8 Gain or (loss) from sales of assets other than inventory			18	-529,578.	
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.		203,066.	0.
13 Total. Add line 12, columns (b), (d), and (e)				203,066.	203,066.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

- | | | Yes | No |
|----------|--|-----|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| | (1) Cash | | X |
| | (2) Other assets | | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

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

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

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 or fiduciary) is based on all information of which preparer has any knowledge.

Ronald S. Schmitt
Signature of officer or trustee

11/15/2010
Date

Chairman, Bd. Trustees

Sign Here

Paid Preparer's Use Only	
---	--

Preparer's signature  **Revier, CPA**
Firm's name (or yours if self-employed), address, and ZIP code **CARNEIRO, CHUMNEY & CO., L.C.
40 NE LOOP 410, SUITE 200
SAN ANTONIO, TX 78216-5876**

Date 11/15/2010

Check if self-employed	☐
------------------------	--------------------------

Preparer's identifying number

Phone no 210-342-8000

Form **990-PF** (2009)

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BROADWAY NATIONAL BANK	349,187.	2,214.	346,973.
BROADWAY NATIONAL BANK	385,222.	0.	385,222.
TOTAL TO FM 990-PF, PART I, LN 4	734,409.	2,214.	732,195.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MISCELLANEOUS	449.	449.	
TOTAL TO FORM 990-PF, PART I, LINE 11	449.	449.	

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SCHMIDT & DAVIS	44.	24.		20.
TO FM 990-PF, PG 1, LN 16A	44.	24.		20.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CARNEIRO, CHUMNEY & CO, LC	10,005.	5,503.		4,502.
AKIN DOHERTY KLEIN & FEUGE	7,250.	3,987.		3,263.
TO FORM 990-PF, PG 1, LN 16B	17,255.	9,490.		7,765.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BROADWAY BANK	59,858.	59,858.			0.
TO FORM 990-PF, PG 1, LN 16C	59,858.	59,858.			0.

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EXCISE TAX	8,726.	0.			0.
FOREIGN TAXES	9,773.	9,773.			0.
PERSONAL PROPERTY	39.	4.			35.
TO FORM 990-PF, PG 1, LN 18	18,538.	9,777.			35.

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OFFICE EXPENSE	901.	90.			811.
POSTAGE	2,301.	230.			2,071.
PUBLIC RELATIONS	104.	10.			94.
REPAIRS & MAINTENANCE	375.	38.			337.
SELECTION COMMITTEE	29,929.	0.			29,929.
SUNDRY EXPENSE	972.	97.			875.
SUPPLIES	1,058.	106.			952.
TRANSCRIPT COSTS	126.	0.			126.
TELEPHONE	1,531.	153.			1,378.
INTERNET ACCESS	405.	40.			365.
WEB HOSTING	305.	30.			275.
INSURANCE	3,559.	356.			3,203.
TO FORM 990-PF, PG 1, LN 23	41,566.	1,150.			40,416.

FOOTNOTES

STATEMENT 8

ASSETS LISTED ON PAGE 2, PART II, LINE 2 - TEMPORARY
INVESTMENTS INCLUDE CASH EQUIVALENTS WHICH PAY DIVIDENDS.
THESE DIVIDENDS ARE INCLUDED ON PAGE 1, PART I, LINE 4.

THE FUNDING OF SCHOLARSHIPS FOR STUDENTS WILL GENERALLY
CONTINUE FOR 4 YEARS/8 SEMESTERS AS LONG AS THE
STUDENT MAINTAINS A 2.0 GPA, PASSES 24 HOURS DURING
THE FALL & SPRING SEMESTERS AND ATTENDS AN ELIGIBLE
SCHOOL.

FORM 990-PF

CORPORATE STOCK

STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ABSOLUTE STRATEGIES FUND 90,701.402	968,194.	947,830.
ADOBE SYSTEMS INC 6,700	187,473.	246,426.
ALLSTATE CORP 6,775	268,617.	203,521.
ALTRIA GROUP INC 8,870	178,934.	174,118.
AMPHENOL CORP 5,750	175,348.	265,535.
APACHE CORP 1,620	74,865.	167,135.
APPLE INC 1,515	136,022.	319,259.
AT&T INC 8,345	216,132.	233,910.
BERKSHIRE HATHAWAY INC 35	117,009.	115,010.
BRISTOL MYERS SQUIBB 9,400	217,467.	237,350.
CVS CAREMARK CORP 4,325	112,764.	139,308.
CATERPILLAR INC 5,050	368,647.	287,800.
CHARLES SCHWAB CORP 7,545	138,161.	141,997.
CHEVRON CORPORATION 2,505	143,632.	192,860.
CISCO SYSTEMS INC 9,735	186,577.	233,056.
COLGATE-PALMOLIVE COMPANY 2,060	137,783.	169,229.
COSTCO WHOLESALE CORP 2,755	120,206.	163,013.
DANAHER CORP 3,100	161,433.	233,120.
DEVON ENERGY CORPORATION 2,300	178,976.	169,050.
EMC CORP/MASS 13,065	188,149.	228,246.
EXPRESS SCRIPTS INC 2,600	211,713.	224,692.
EXXON MOBIL CORPORATION 2,400	9,556.	163,656.
GENERAL DYNAMICS CORP 3,230	163,268.	220,189.
GENERAL ELECTRIC COMPANY 12,805	277,864.	193,740.
GENERAL MILLS INC 2,495	162,059.	176,671.
GENZYME CORPORATION 3,815	252,848.	186,973.
GOLDMAN SACHS GROUP 1,095	211,785.	184,880.
HCC INSURANCE HOLDINGS IN 7,450	200,934.	208,377.
IBM 1,975	176,854.	258,528.
JOHNSON & JOHNSON 3,565	227,060.	229,622.
JPMORGAN CHASE & CO 3,080	144,358.	128,344.
MDU RESOURCES GROUP INC 10,525	276,733.	248,390.
MEDTRONIC INC 5,750	289,314.	252,885.
MONSANTO CO 3,335	269,049.	272,636.
NIKE INC CLASS B 3,325	212,609.	219,683.
OCCIDENTAL PETROLEUM CORP 2,310	168,815.	187,919.
ORACLE CORPORATION 10,360	139,597.	254,131.
PEPSICO INC 3,500	247,099.	212,800.
PHILIP MORRIS INTERNATIONAL INC 3,215	152,778.	154,931.
PPL CORP 7,120	208,785.	230,047.
PROCTER & GAMBLE CO 3,110	97,672.	188,559.
TARGET CORP 4,205	159,188.	203,396.
THERMO FISHER SCIENTIFIC INC 4,420	153,631.	210,790.
UNITED TECHNOLOGIES INC 4,230	181,312.	293,604.
VF CORPORATION 2,840	222,885.	208,002.
WALGREEN COMPANY 4,175	151,380.	153,306.
WALT DISNEY COMPANY 7,465	222,591.	240,746.

BAUMBERGER ENDOWMENT

23-7225925

ZIMMER HOLDINGS INC 3,935	282,173.	232,598.
INGERSOLL-RAND COMPANY 6,070	223,250.	216,942.
NOBLE CORPORATION 3,555	97,865.	144,689.
NOKIA CORP ADR A 9,000	146,145.	115,650.
SCHLUMBERGER LIMITED 1,925	131,424.	125,298.
TOTAL SA-SPON ADR 2,025	116,579.	129,681.
VODAFONE GROUP PLC NEW 6,374	192,199.	147,176.
TOTAL TO FORM 990-PF, PART II, LINE 10B	10,657,761.	11,687,304.

FORM 990-PF	CORPORATE BONDS	STATEMENT 10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ABBOTT LABORATORIES 5.875% DUE 5/15/2016 400,000	416,464.	441,196.
BERKSHIRE HATHAWAY FIN 4.75% DUE 5/15/2012 400,000	392,431.	426,426.
GENERAL ELECTRIC CAPITAL CORP. 5.65% DUE 06/14/2014 400,000	398,848.	427,093.
GOLDMAN SACHS GROUP INC 5.125% DUE 1/15/2015 350,000	344,918.	367,763.
HOME DEPOT INC 5.4% DUE 3/1/16 350,000	351,057.	366,401.
MERRILL LYNCH & CO 5.45% DUE 7/15/2014 350,000	353,241.	365,755.
PEPSICO INC 5.15% DUE 5/15/2012 400,000	392,696.	430,600.
A T & T INC 5.1% DUE 9/15/2014 400,000	398,196.	430,264.
TOYOTA MOTOR CREDIT CORP 5.25% DUE 12/22/2011 350,000	349,615.	373,765.
TOTAL TO FORM 990-PF, PART II, LINE 10C	3,397,466.	3,629,263.

FORM 990-PF	MORTGAGE LOANS	STATEMENT 11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FEDERAL HOME LOAN BANKS 7.375% DUE 2/12/2010 410,000	418,397.	413,075.
FEDERAL HOME LOAN MTG CORP 5.625% DUE 3/15/2011 200,000	199,438.	211,687.
FEDERAL HOME LOAN MRG CORP 5.125% DUE 7/15/2012 500,000	506,719.	543,125.
FEDERAL NATL MTG ASSN 7.25% DUE 01/15/2010 500,000	500,670.	501,094.
FEDERAL NATL MTG ASSN 6.25% DUE 02/01/2011 227,000	224,668.	238,479.
FEDERAL NATL MTG ASSN 5.375% DUE 06/12/2017 500,000	490,990.	554,375.

BAUMBERGER ENDOWMENT

23-7225925

GVT NTL MTG ASSN PL #2577 6.5% DUE 4/20/2028 14,635.1.77	14,466.	15,866.
GVT NTL MTG ASSN PL #2741 6.5% DUE 4/20/2029 15,250.51	15,255.	16,535.
GVT NTL MTG ASSN GTD PASS THRU CTF POOL #325352 4,857.33	4,882.	5,566.
GVT NTL MTG ASSN POOL #341673 7.0% DUE 1/15/2023 6,211.82	6,212.	6,879.
TOTAL TO FORM 990-PF, PART II, LINE 12	2,381,697.	2,506,681.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 12
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
BOSTON PROPERTIES, INC 540	COST	20,373.	36,218.
HCP INC TRUST 1,280	COST	23,282.	39,091.
HEALTHCARE REALTY TRUST INC 885	COST	22,385.	18,992.
HOSPITALITY PROPERTIES TRUST 2,600	COST	72,778.	61,646.
KIMCO REALTY CORPORATION 1,300	COST	38,097.	17,589.
MACK-CALI REALTY CORPORATION 1,400	COST	42,462.	48,398.
PUBLIC STORAGE INC 700	COST	19,276.	57,015.
REALTY INCOME CORPORATION 1,000	COST	16,792.	25,910.
SIMON PROPERTY GROUP (PREV SIMON DEBARTOLO GRP) 835.13	COST	23,408.	66,643.
TANGER FACTORY OUTLET CENTER 1,800	COST	29,505.	70,182.
VANGUARD INFLATION-PROTECTED SECURITES FUND 41,693.941	COST	1,021,049.	1,027,756.
COLUMBIA ACORN FUND CL Z 11,368.466	COST	307,336.	280,574.
LOOMIS SAYLES SMALL CAP VALUE FUND #1165 22,383.889	COST	513,571.	479,015.
VANGUARD EXPLORER FUND ADMIRAL SHARES 8,156.2870	COST	517,680.	434,730.
AMERICAN FUNDS-EUROPACIFIC GROWTH FUND 38,359.989	COST	1,539,805.	1,463,434.
TEMPLETON FOREIGN EQUITY SERIES 32,262.674	COST	818,933.	622,670.
ISHARES MSCI EAFE INDEX FUND 12,335	COST	522,903.	681,879.
MAJESTY OFFSHORE, LTD 700,000	COST	709,838.	741,585.
AMERICAN CAPITAL WORLD BOND FUND 16,920.249	COST	313,334.	337,728.
LOOMIS SAYLES GLOBAL BOND FUND 22,719.654	COST	313,333.	363,060.
TEMPLETON GLOBAL BOND FUND 27,248.699	COST	313,333.	346,603.
IPATH DOW JONES-AIG COMMODITY INDEX FUND 6,450 SHS	COST	240,736.	272,577.
POWERSHARES DB COMMODITY INDEX 8,920 SHS	COST	221,236.	219,610.
SPDR GOLD TRUST 4,720	COST	437,012.	506,503.
TOTAL TO FORM 990-PF, PART II, LINE 13		8,098,457.	8,219,408.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 13

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
OFFICE FURNITURE AND FIXTURES	7,843.	7,844.	-1.
OFFICE EQUIPMENT	6,240.	6,240.	0.
FILE EQUIPMENT	530.	530.	0.
TYPEWRITER	89.	89.	0.
PHONE SYSTEM	745.	745.	0.
VERTICAL FILE	540.	540.	0.
BROTHER TYPEWRITER	105.	105.	0.
SEALER-POSTAGE METER	175.	175.	0.
COMDIAL PHONE SYSTEM	1,115.	1,115.	0.
FILE CABINETS	534.	534.	0.
OFFICE CHAIRS	440.	433.	7.
COMPUTER TABLE	60.	32.	28.
GATEWAY COMPUTER 1730	1,846.	1,846.	0.
COMPUTER NETWORK/DSL			
CONNECTION	1,109.	1,109.	0.
GATEWAY COMPUTER	1,079.	720.	359.
COPY STAR CS-2550 DIGITAL			
COPIER	3,919.	1,176.	2,743.
TOTAL TO FM 990-PF, PART II, LN 14	26,369.	23,233.	3,136.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 14
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
RONALD SCHMIDT P.O. BOX 6067 SAN ANTONIO, TX 78209-0067	CHAIRMAN 4.00	4,200.	0.	0.
FRANK BURK P.O. BOX 6067 SAN ANTONIO, TX 78209-0067	SECRETARY 2.00	4,200.	0.	0.
ALBERT J TIETZE JR P.O. BOX 6067 SAN ANTONIO, TX 78209-0067	TRUSTEE 2.00	4,200.	0.	0.
KENNETH M TAGGART P.O. BOX 6067 SAN ANTONIO, TX 78209-0067	TRUSTEE 2.00	4,200.	0.	0.
NANCY MAY P.O. BOX 6067 SAN ANTONIO, TX 78209-0067	TRUSTEE 2.00	1,050.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		17,850.	0.	0.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 15

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AUSTIN COLLEGE 900 N GRAND AVE SHERMAN, TX 75090-4400	N/A SCHOLARSHIPS	PUBLIC	14,500.
NORTHWEST VISTA COLLEGE 3535 N ELLISON DR SAN ANTONIO, TX 78251	N/A SCHOLARSHIPS	PUBLIC	10,000.
RICE UNIVERSITY 6100 MAIN STREET HOUSTON, TX 77005-1827	N/A SCHOLARSHIPS	PUBLIC	24,672.
SAM HOUSTON STATE UNIVERSITY 1903 UNIVERSITY AVE HUNTSVILLE, TX 77340	N/A SCHOLARSHIPS	PUBLIC	10,000.
SAN ANTONIO COLLEGE 1300 SAN PEDRO AVE SAN ANTONIO, TX 78212-4299	N/A SCHOLARSHIPS	PUBLIC	7,500.
ST EDWARDS UNIVERSITY 3001 SOUTH CONGRESS AVE AUSTIN, TX 78704	N/A SCHOLARSHIPS	PUBLIC	7,500.
ST PHILLIPS COLLEGE 1801 MARTIN LUTHER KING DR SAN ANTONIO, TX 78203	N/A SCHOLARSHIPS	PUBLIC	850.
STEPHEN F AUSTIN UNIVERSITY 1936 NORTH ST NACOGDOCHES, TX 75961	N/A SCHOLARSHIPS	PUBLIC	5,000.

BAUMBERGER ENDOWMENT

23-7225925

TEXAS A & M UNIVERSITY AT CORPUS CHRISTI 6300 OCEAN DRIVE CORPUS CHRISTI, TX 78412	N/A SCHOLARSHIPS	PUBLIC	13,367.
TEXAS A & M UNIVERSITY THE PAVILION COLLEGE STATION, TX 77843	N/A SCHOLARSHIPS	PUBLIC	214,644.
TEXAS A & M UNIVERSITY AT SAN ANTONIO 1450 GILLETTE BLVD SAN ANTONIO, TX 78224	N/A SCHOLARSHIPS	PUBLIC	2,500.
TEXAS STATE UNIVERSITY 501 UNIVERSITY DRIVE SAN MARCOS, TX 78666	N/A SCHOLARSHIPS	PUBLIC	35,540.
TEXAS TECH UNIVERSITY 2500 BROADWAY LUBBOCK, TX 79409	N/A SCHOLARSHIPS	PUBLIC	27,250.
TEXAS WOMAN'S UNIVERSITY 304 ADMINISTRATION DRIVE DENTON, TX 76204	N/A SCHOLARSHIPS	PUBLIC	4,590.
THE UNIVERSITY OF TEXAS AT ARLINGTON 701 S NEDDERMAN DRIVE ARLINGTON, TX 76019	N/A SCHOLARSHIPS	PUBLIC	5,000.
THE UNIVERSITY OF TEXAS AT AUSTIN BOX 7758, UNIV STA AUSTIN, TX 78712	N/A SCHOLARSHIPS	PUBLIC	387,775.
THE UNIVERSITY OF TEXAS AT SAN ANTONIO ONE UTSA CIRCLE SAN ANTONIO, TX 78249-1644	N/A SCHOLARSHIPS	PUBLIC	162,843.
TRINITY UNIVERSITY ONE TRINITY PLACE SAN ANTONIO, TX 78212-7200	N/A SCHOLARSHIPS	PUBLIC	65,408.

BAUMBERGER ENDOWMENT

23-7225925

UNIVERSITY OF HOUSTON
4800 CALHOUN RD HOUSTON, TX
77004

N/A
SCHOLARSHIPS

PUBLIC

9,500.

UTHSC - SAN ANTONIO
7703 FLOYD CURL DR SAN ANTONIO,
TX 78229

N/A
SCHOLARSHIPS

PUBLIC

4,500.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

1,012,939.

33rd ANNUAL



2011-2012

7201 Broadway • Suite 300

• San Antonio, Texas

78209

SCHOLARSHIP APPLICATION

High School Senior

ELIGIBILITY

To be eligible an applicant must:

1. be a graduating senior (Class of 2011) of an accredited (TEA) high school within Bexar County, Texas.
2. have resided in Texas for at least ten (10) years.
3. achieve a minimum total score of **1000** on the new SAT using the Critical Reading and Math scores only, or composite of **22** on the ACT.
4. rank in the upper one-half of high school graduating class.
5. be unable to attend college without financial assistance.
6. be planning to attend a **state-supported** or **non-denominational** college or university within the State of Texas.
7. be of good character.

DEADLINE DATES

1. Financial Information Form – Submit form with Scholarship Application to Baumberger office by **FEBRUARY 15**. (See instructions)
2. Application – Submit completed application to Baumberger office by **FEBRUARY 15**.
3. High School Transcript – Submit official copy with application to be received in Baumberger office by **FEBRUARY 15**. (See instructions)
4. Student applicant must assume the responsibility of submitting all materials prior to deadlines.

INSTRUCTIONS

1. Check with your Counselor to determine your eligibility as an applicant.
2. Submit an official transcript through the Fall term: include Spring courses in progress, if possible. Transcript should indicate SAT or ACT scores, rank in class, and grade point average.
Observe Deadline Date of February 15.
3. Complete a 2011-2012 Financial Information Form provided by Baumberger Endowment (attached to the back of this application).
4. Complete this application in pen or type. (Do not use a pencil.)
5. Take your time in completing this application, giving full consideration to each answer. Misleading information could cause a delay or disqualification.
6. Complete all items; leave no blanks. If an item is not applicable, write "n/a" or, if none, write "none."
7. Use last page for additional comments regarding your answers to any of the questions. Number your comments to correspond to the number of the question on the application.
8. Do not include pictures or letters of recommendation.
9. If you have any questions contact your high school counselor.
10. Forward your completed application and transcript to the **BAUMBERGER ENDOWMENT, 7201 BROADWAY, SUITE 300, SAN ANTONIO, TEXAS 78209** for arrival no later than **FEBRUARY 15**.

ANY APPLICATION RECEIVED AFTER FEBRUARY 15 OR ONE NOT MEETING ALL ELIGIBILITY REQUIREMENTS WILL BE RETURNED WITHOUT PROCESSING.
AN ORIGINAL APPLICATION (NO PHOTOCOPIES OR FAXED COPIES) MUST BE SUBMITTED.

PERSONAL DATA

1. _____
Last Name First Middle
2. _____
Permanent Address City Zip
3. _____
Telephone Number E-Mail Address Social Security Number
4. _____
High School Graduation Date
5. _____
High School Address City County Zip
6. What **state-supported** or eligible **non-denominational** college or university in the State of Texas do you wish to attend?

First Choice: _____

Second Choice: _____
7. Have you applied for admission? _____
8. Have you been accepted? _____
9. Do you plan to apply for financial assistance at your college or university? _____

(OFFICE USE ONLY)

- | | |
|---|---|
| ☐ Application | ☐ Rank |
| ☐ Transcript | ☐ Eligible Institution |
| ☐ Residence | ☐ FIF |
| ☐ SAT Scores [must be listed on transcript or test page] | |
| ☐ ACT Scores [must be listed on transcript or test page] | |

A. Student's Information:

1. Name (Mr.) (Miss) _____

Last
First
Middle

2. Permanent Home Address _____

Number and Street

City
State
Zip

3. Telephone Number _____ Social Security No. _____

4. Date of Birth _____ Place of Birth _____

Month
Day
Year

City
State

5. Are you a United States citizen? Yes () No () If not, what is your citizenship and your status in the U.S.? _____

B. Residence:

Home address for past **ten (10)** years (or longer if necessary to show 10 years in Texas):

DATES

From	To	Number and Street	City and State
_____	present	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

C. High School Certification:

Must be completed and signed by High School Counselor			
Test Scores		Rank in Class:	GPA:
SAT (Verbal & Math Scores ONLY)	ACT		
Verbal: (Critical Reading)		Number in Class:	Scale:
Math: _____		By:	
Total:	Composite:	Title:	

D. Educational Experience and Plans:

1. Name of high school attending. _____
2. Have you attended any other senior high schools? Yes () No () If yes, please explain where and why.

3. Have you ever been suspended or dismissed from any school? Yes () No () If yes, please explain.

4. What school activities, clubs, societies, and community organizations have you participated in including offices held during the past two years? (List honor societies under number 5.)

5. What honors have you earned in high school? _____

6. List courses in progress. _____

7. What is your anticipated academic major? _____
8. What is your primary career objective? _____
9. Do you think you will make any educational plans beyond earning your bachelor's degree? Yes () No () If yes, please explain. _____

E. Employment and Savings:

1. Are you presently employed? Yes () No () If yes, give a short resume of your duties, hours, and salary.

2. Did you work last summer? Yes () No () If yes, describe job, hours, and salary.

3. If you did not work, describe any activity or travel during the summer.

F. Character References: Do not include names of relatives or fellow students.

	Name and Address	Occupation	Telephone No.
1.	_____	_____	_____

2.	_____	_____	_____

3.	_____	_____	_____

G. Certification by Student and Parents:

I hereby apply for a scholarship from the Baumberger Endowment to assist in the payment of my educational expenses while in full-time attendance at a state-supported or non-denominational college or university located in the State of Texas during the 2011-2012 academic year. I believe I qualify as a candidate for the scholarship and meet all of the eligibility requirements as specified on Page 1 of this application. The information submitted is true and correct to the best of my knowledge and belief. This certification is acknowledged by my parents.

Signature of Applicant

Date

Signature of Parent or Guardian

Date

(USE BACK PAGE FOR ADDITIONAL COMMENTS)

(DO NOT include FIF information)

Number your comments to correspond to the number of the question on the application.

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. A faint vertical margin line is present on the left side, creating a narrow left margin. The paper appears to be from a notebook or a standard writing template.



7201 Broadway • Suite 300 • San Antonio, Texas 78209

FINANCIAL INFORMATION FORM

Student Information

1. Student's Name: _____ Social Security #: _____
2. Address: _____ City: _____ State: _____ Zip: _____
3. Date of Birth: _____ Age: _____
4. Student's marital status (Check only one): _____ Unmarried _____ Married _____ Separated
5. Number of other dependents (**do not** include student or spouse): _____
(List "other dependents" and ages on Number 31)
6. Check any that are applicable to the student: _____ Ward _____ Orphan (Explain on Number 31)
7. Student's wages, salaries, tips, etc. (before taxes and deductions):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
8. Spouse's wages, salaries, tips, etc., if applicable, (before taxes and deductions):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
9. Other taxable income (or loss) (interest, dividends, etc.):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
10. Adjusted gross income (**Do not** include financial aid):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
11. Untaxed income and benefits (include Social Security, VA Benefits, etc.):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
12. U.S. Income Tax paid: Calendar Year 2010: \$ _____
13. Cash, savings, and checking accounts at present time (excluding scholarship/grant monies): \$ _____
14. Investments (stocks, bonds, etc.) (explain on Number 31): \$ _____

Parents Information

- 15.a. Father – Stepfather (circle one) wages, salaries, etc.:
 - A. 2009 \$ _____
 - B. Estimated 2010 \$ _____
 - C. Estimated 2011 \$ _____
- b. Mother – Stepmother (circle one) wages, salaries, etc.:
 - A. 2009 \$ _____
 - B. Estimated 2010 \$ _____
 - C. Estimated 2011 \$ _____
- c. Other taxable income (or loss) (interest, dividends, etc.):
 - A. 2009 \$ _____
 - B. Estimated 2010 \$ _____
 - C. Estimated 2011 \$ _____

16. Gross income: (Total sum of 15 a. b. c.)
A. 2009 \$ _____
B. Estimated 2010 \$ _____
C. Estimated 2011 \$ _____
17. Social Security benefits:
A. 2009 \$ _____
B. Estimated 2010 \$ _____
C. Estimated 2011 \$ _____
18. Other untaxed income (child support, welfare, veterans benefits, etc.):
A. 2009 \$ _____
B. Estimated 2010 \$ _____
C. Estimated 2011 \$ _____
19. Total U.S. income tax paid (including withholding): 2010 \$ _____
20. Medical and dental expenses not covered by insurance (Do not include insurance premiums): 2010 \$ _____
21. Number of dependent children in 2010 _____
22. Other unusual expenses (explain on Number 31): 2010 \$ _____
23. Cash, savings, and checking accounts at present time: \$ _____
24. Father – Stepfather (circle one)
Name: _____
Home Address: _____
Occupation/employer: _____
25. Mother – Stepmother (circle one)
Name: _____
Home Address: _____
Occupation/employer: _____
26. Parents current marital status: (circle one) Single/Never Married Married/Remarried Separated/Divorced Widowed
27. Date of Birth of older parent: _____
28. Total number of exemptions to be claimed on parents' 2010 U.S. income tax return: _____
29. Total size of parents' household during 2011-2012 academic year (include the student named on this form, parents, other dependent children, and other dependents): _____
30. Number of dependents in family, excluding parents, that will be in college at least half-time during 2011-2012 academic year: _____
31. Use this space to explain any unusual circumstances: _____

Certification and Authorization

I (We) declare that the information reported is true, correct, and complete. I (We) agree that, to verify information reported on this form, I (We) will, on request, provide the Baumberger Endowment with an official photocopy of my (our) 2010 U.S. income tax return. I (We) further agree to provide, if requested, any other official documentation to verify information reported.

Student's Telephone Number (_____) _____ Date: _____

Student's Signature _____

Spouse's Signature _____

Father's Signature _____

Mother's Signature _____