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

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 CAROLYN W. & CHARLES T. BEAIRD FAMILY FOUNDATION		A Employer identification number 72-6027212
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number 318-221-2823
	City or town, state, and ZIP code SHREVEPORT, LA 71101-3015		C If exemption application is pending, check here ☐
	H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 20,996,231. (Part I, column (d) must be on cash basis)		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	62,764.	62,764.		STATEMENT 1
	4 Dividends and interest from securities	163,734.	163,734.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-140,009.			
	b Gross sales price for all assets on line 6a	11,142,014.			
	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	130,383.	130,383.		STATEMENT 3	
12 Total. Add lines 1 through 11	216,872.	356,881.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	72,310.	0.		72,310.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	9,201.	0.		9,201.
	16a Legal fees STMT 4	877.	0.		877.
	b Accounting fees STMT 5	5,283.	2,783.		2,500.
	c Other professional fees STMT 6	10,643.	10,643.		0.
	17 Interest				
	18 Taxes STMT 7	6,946.	68.		0.
	19 Depreciation and depletion	2,128.	0.		
	20 Occupancy				
	21 Travel, conferences, and meetings	21,052.	0.		21,052.
	22 Printing and publications				
	23 Other expenses STMT 8	11,163.	0.		11,163.
	24 Total operating and administrative expenses. Add lines 13 through 23	139,603.	13,494.		117,103.
	25 Contributions, gifts, grants paid	626,255.			626,255.
26 Total expenses and disbursements. Add lines 24 and 25	765,858.	13,494.		743,358.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-548,986.				
b Net investment income (if negative, enter -0-)		343,387.			
c Adjusted net income (if negative, enter -0-)			N/A		

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CAROLYN W. & CHARLES T. BEAIRD

Form 990-PF (2009)

FAMILY FOUNDATION

72-6027212

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Part II Balance Sheets

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

		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing		1.	1.	
	2 Savings and temporary cash investments	11,219,960.	173,535.	173,535.	
	3 Accounts receivable ▶				
	Less: allowance for doubtful accounts ▶				
	4 Pledges receivable ▶				
	Less: allowance for doubtful accounts ▶				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ▶				
	Less: allowance for doubtful accounts ▶				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges	4,800.	46,596.	46,596.	
	10a Investments - U.S. and state government obligations	406,707.			
	b Investments - corporate stock STMT 9	2,712,059.	14,433,406.	14,530,645.	
	c Investments - corporate bonds	484,619.			
	11 Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶				
	12 Investments - mortgage loans				
	13 Investments - other				
	14 Land, buildings, and equipment: basis ▶ 13,148.				
	Less: accumulated depreciation STMT 10 ▶ 11,113.	4,163.	2,035.	2,035.	
	15 Other assets (describe ▶ STATEMENT 11)	6,243,419.	5,843,801.	6,243,419.	
	16 Total assets (to be completed by all filers)	21,075,727.	20,499,374.	20,996,231.	
	Liabilities	17 Accounts payable and accrued expenses	2,744.	2,641.	
		18 Grants payable	35,000.	75,000.	
19 Deferred revenue					
20 Loans from officers, directors, trustees, and other disqualified persons					
21 Mortgages and other notes payable					
22 Other liabilities (describe ▶)		27,264.	0.		
23 Total liabilities (add lines 17 through 22)	65,008.	77,641.			
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	20,975,719.	20,346,733.		
	25 Temporarily restricted	35,000.	75,000.		
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds				
	28 Paid-in or capital surplus, or land, bldg., and equipment fund				
	29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances	21,010,719.	20,421,733.			
31 Total liabilities and net assets/fund balances	21,075,727.	20,499,374.			

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	21,010,719.
2 Enter amount from Part I, line 27a	2	-548,986.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	20,461,733.
5 Decreases not included in line 2 (itemize) ▶ CHANGE IN GRANTS PAYABLE	5	40,000.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	20,421,733.

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			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 11,142,014.		11,282,023.	-140,009.
b			
c			
d			
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))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-140,009.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-140,009.
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	565,751.	15,772,958.	.035868
2007	548,140.	11,211,987.	.048889
2006	496,765.	10,754,746.	.046190
2005	201,691.	9,704,047.	.020784
2004	195,233.	4,089,417.	.047741

2 Total of line 1, column (d)	2	.199472
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	.039894
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	20,890,741.
5 Multiply line 4 by line 3	5	833,415.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,434.
7 Add lines 5 and 6	7	836,849.
8 Enter qualifying distributions from Part XII, line 4	8	743,358.

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)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	6,868.
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	6,868.
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	6,868.
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	50,464.
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	50,464.
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	43,596.
11	Enter the amount of line 10 to be: Credited to 2010 estimated tax ☐ Refunded ☐	11	0.

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
1b 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
1c Did the foundation file Form 1120-POL for this year?		X
2 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) ☐ LA		
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

N/A

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FAMILY FOUNDATION

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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? Website address ► WWW.BEAIRDFOUNDATION.ORG	13	X	
14	The books are in care of ► THE ORGANIZATION Telephone no. ► 318-221-2823 Located at ► 330 MARSHALL STREET, SHREVEPORT, LA ZIP+4 ► 71101-3015			
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		

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		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?		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 ►		
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.)	N/A	
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)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

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

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

6b

X

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 12		72,310.	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
NONE				

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

0

Part VIII`

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

[illegible]

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

C

Part IX-A

Summary of Direct Charitable Activities

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

Expenses

1	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	
2		
	All other program-related investments. See instructions	
3		

Total. Add lines 1 through 3

0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	5,667,926.
b	Average of monthly cash balances	1b	8,900,513.
c	Fair market value of all other assets	1c	6,640,435.
d	Total (add lines 1a, b, and c)	1d	21,208,874.
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	21,208,874.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	318,133.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	20,890,741.
6	Minimum investment return. Enter 5% of line 5	6	1,044,537.

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	1,044,537.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	6,868.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	6,868.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,037,669.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,037,669.
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	1,037,669.

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	743,358.
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	743,358.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	743,358.

Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				1,037,669.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			650,182.	
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 ▶ \$ 743,358.				
a Applied to 2008, but not more than line 2a			650,182.	
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				93,176.
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.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				944,493.
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				

N/A

- b** Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(1)(3) or ☐ 4942(1)(5)

- b 85% of line 2a

- c** Qualifying distributions from Part XII,
line 4 for each year listed

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon:

- a "Assets" alternative test - enter:
(1) Value of all assets

- (2) Value of assets qualifying under section 4942(i)(3)(B)(i)

- b** "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

- c "Support" alternative test - enter:

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(i)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization

- (4) Gross investment income

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

SEE STATEMENT 13

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

- c Any submission deadlines:

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

**CAROLYN W. & CHARLES T. BEAIRD
FAMILY FOUNDATION**
Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SEE STATEMENT 14				
Total			▶ 3a	626,255.
b Approved for future payment				
ACCION TEXAS-LOUISIANA 2014 S. HACKBERRY ST. SAN ANTONIO, TX 78210	N/A	OTHER CHARITY	MICRO-LENDING PROGRAM	75,000.
Total				▶ 3b 75,000.

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

[illegible]

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

- | b If "Yes," complete the following schedule. | | |
|--|--------------------------|---------------------------------|
| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
| N/A | | |
| | | |
| | | |
| | | |
| | | |

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.

Signature of officer or trustee

Date _____

EXECUTIVE DIRECTOR

Title

Preparer's
signature

Date

Check if self- employee	
-------------------------------	--

Preparer's identifying number

Firm's name (or yours if self-employed),
address, and ZIP code

GILBREATH, BURNS & SMATHERS, A.P.A.C.

400 TRAVIS ST., SUITE 600

SHREVEPORT, LA 71101-3163

Phone no. (318) 424-4093

2009 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	MICROEDGE SOFTWARE	021506	SL	3.00	17	8,309.			8,309.	6,925.		1,384.
2	OFFICE FURNITURE	021506	SL	7.00	17	3,632.			3,632.	1,297.		519.
3	HP COMPUTER	031506	SL	5.00	17	727.			727.	363.		145.
4	MS OFFICE SOFTWARE	031506	SL	3.00	17	480.			480.	400.		80.
	* TOTAL 990-PF PG 1					13,148.		0.	13,148.	8,985.	0.	2,128.
	DEPR											

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
BERNSTEIN MMKT	826.
BERNSTEIN-U.S. TREASURY	5,808.
CREDIT INTEREST	911.
MORGAN KEEGAN-CERTIFICATES OF DEPOSIT	21,713.
MORGAN KEEGAN-MONEY MKT	32,509.
REGIONS BANK	194.
SMITH BARNEY MMKT	803.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	62,764.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BERNSTEIN (DIVIDENDS)	85,575.	0.	85,575.
BERNSTEIN-FHLM BONDS	8,678.	0.	8,678.
SMITH BARNEY (DIVIDENDS)	31,594.	0.	31,594.
SMITH BARNEY-FHLM BONDS	21,734.	0.	21,734.
SMITH BARNEY-U.S. TREASURY	16,153.	0.	16,153.
TOTAL TO FM 990-PF, PART I, LN 4	163,734.	0.	163,734.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
LITIGATION SETTLEMENTS	153.	153.	
FROM K-1:BEAIRD PROP LLC (NET INVESTMENT INCOME)72-1379082	130,230.	130,230.	
TOTAL TO FORM 990-PF, PART I, LINE 11	130,383.	130,383.	

FORM 990-PF	LEGAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	877.	0.		877.
TO FM 990-PF, PG 1, LN 16A	877.	0.		877.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GILBREATH, BURNS & SMATHERS	5,283.	2,783.		2,500.
TO FORM 990-PF, PG 1, LN 16B	5,283.	2,783.		2,500.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
VAUGHN, NELSON INVESTMENT MGT.	10,643.	10,643.		0.
TO FORM 990-PF, PG 1, LN 16C	10,643.	10,643.		0.

FORM 990-PF	TAXES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX ON INVESTMENT INCOME	6,868.	0.		0.
FOREIGN TAX	68.	68.		0.
FILING FEES	10.	0.		0.
TO FORM 990-PF, PG 1, LN 18	6,946.	68.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	8
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DIRECTOR & OFFICERS LIAB INS	1,298.	0.		1,298.
DUES	1,665.	0.		1,665.
OFFICE EXPENSE	5,817.	0.		5,817.
WEBSITE EXPENSE	583.	0.		583.
MEMBER COMPENSATION	1,800.	0.		1,800.
TO FORM 990-PF, PG 1, LN 23	11,163.	0.		11,163.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
	14,433,406.	14,530,645.
TOTAL TO FORM 990-PF, PART II, LINE 10B	14,433,406.	14,530,645.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	10
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
MICROEDGE SOFTWARE	8,309.	8,309.	0.
OFFICE FURNITURE	3,632.	1,816.	1,816.
HP COMPUTER	727.	508.	219.
MS OFFICE SOFTWARE	480.	480.	0.
TOTAL TO FM 990-PF, PART II, LN 14	13,148.	11,113.	2,035.

FORM 990-PF	OTHER ASSETS		STATEMENT 11
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
NON-VOTING PARTNERSHIP INTEREST	6,243,419.	5,843,801.	6,243,419.
TO FORM 990-PF, PART II, LINE 15	6,243,419.	5,843,801.	6,243,419.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 12
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
SUSAN BEAIRD 330 MARSHALL ST., SUITE 1112 SHREVEPORT, LA 71101	PRESIDENT 2.00	0.	0.	0.
FRANCES S. SEAWELL 330 MARSHALL ST., SUITE 1112 SHREVEPORT, LA 71101	VICE-PRESIDENT 2.00	0.	0.	0.
PHILLIP BOYLE 330 MARSHALL ST., SUITE 1112 SHREVEPORT, LA 71101	SECRETARY 0.50	0.	0.	0.
GEORGE M. MCCORMICK III 330 MARSHALL ST., SUITE 1112 SHREVEPORT, LA 71101	TREASURER 1.00	0.	0.	0.
MARJORIE SEAWELL 330 MARSHALL ST., SUITE 1112 SHREVEPORT, LA 71101	DIRECTOR 0.50	0.	0.	0.
JENNIFER MCCORMICK 330 MARSHALL ST., SUITE 1112 SHREVEPORT, LA 71101	DIRECTOR 0.50	0.	0.	0.
JOHN BEAIRD 330 MARSHALL ST., SUITE 1112 SHREVEPORT, LA 71101	DIRECTOR 0.50	0.	0.	0.
LESLIE DARR 330 MARSHALL ST., SUITE 1112 SHREVEPORT, LA 71101	DIRECTOR 0.50	0.	0.	0.

JAMES R. MONTGOMERY	EXECUTIVE DIRECTOR			
330 MARSHALL ST., SUITE 1112	40.00	72,310.	0.	0.
SHREVEPORT, LA 71101				
SUSIE SEAWELL	DIRECTOR			
330 MARSHALL ST., SUITE 1112	0.50	0.	0.	0.
SHREVEPORT, LA 71101				
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		72,310.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 13

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JAMES R. MONTGOMERY, EXECUTIVE DIRECTOR
330 MARSHALL ST., SUITE 1112
SHREVEPORT, LA 71101

TELEPHONE NUMBER

318-221-8276

FORM AND CONTENT OF APPLICATIONS

APPLICATION IS AVAILABLE ON REQUEST AND ON WEBSITE. MUST USE PRESCRIBED
FORM AND SUBMIT IN TRIPLICATE.

ANY SUBMISSION DEADLINES

SEMI-ANNUAL DEADLINES: MARCH 1ST AND SEPTEMBER 1ST

RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS ARE PRIMARILY TO SOCIAL SERVICES PROVIDERS IN THE SHREVEPORT, LA
AREA. NO INDIVIDUAL SCHOLARSHIPS, OR GRANTS TO INDIVIDUALS.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 14

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AAA FUND-RAISERS INC PO BOX 23 KEITHVILLE, LA 71047	N/A SUMMERBRIDGE PROGRAM: EDUCATION	OTHER CHARITY	10,000.
ACCION TEXAS-LOUISIANA 2014 S. HACKBERRY ST. SAN ANTONIO, TX 78210	N/A MICRO-LENDING PROGRAM	OTHER CHARITY	75,000.
ACLU FOUNDATION OF LOUISIANA PO BOX 56157 NEW ORLEANS, LA 70156	N/A SUPPORT PUBLIC EDUCATION, LITIGATION FOR LIBERTIES	OTHER CHARITY	10,000.
AIDS LAW OF LOUISIANA, INC 3801 CANAL ST., STE 331 NEW ORLEANS, LA 70119	N/A SUPPORT FREE LEGAL SERVICES TO PERSONS WITH AIDS	OTHER CHARITY	5,000.
ALLUME' SOCIETY P.O. BOX 935 ABBEVILLE, LA 70510	N/A OPERATING EXPENSES	OTHER CHARITY	1,000.
AM HEALTH ASSISTANCE FDN/MACULAR DEGENERATION RESEARCH 22512 GATEWAY CENTER DR. CLARKSBURG, MD 20871	N/A OPERATING EXPENSES	OTHER CHARITY	61.
AMERICAN DIABETES ASSN TOUR DE CURE 2480 W. 26TH AVE,#120B DENVER, CO 80211	N/A OPERATING EXPENSES	OTHER CHARITY	61.
ARTSPACE 710 TEXAS ST. SHREVEPORT, LA 71101	N/A OPERATING EXPENSES	OTHER CHARITY	250.

CAROLYN W. & CHARLES T. BEAIRD	FAMILY F		72-6027212
AUSTIN PRESBYTERIAN THEOLOGICAL SEMINARY 100 EAST 27TH ST. AUSTIN, TX 787055797	N/A OPERATING EXPENSES	SCHOOL	3,000.
BLUFF LAKE NATURE CENTER 7350 28TH AVE., #300 DENVER, CO 80238	N/A ENVIRONMENTAL EDUCATION FOR CHILDREN	OPERATING FOUNDATION	900.
BLUFF LAKE NATURE CENTER 9801 E. COLFAX AVE., #100 AURORA, CO 80010	N/A ENVIRONMENTAL EDUCATION FOR CHILDREN	OPERATING FOUNDATION	10,000.
BLUFF LAKE NATURE CENTER 9801 E. COLFAX AVE., #100 AURORA, CO 80010	N/A ENVIRONMENTAL EDUCATION FOR CHILDREN	OPERATING FOUNDATION	100.
BLUFF LAKE NATURE CENTER 9801 E. COLFAX AVE., #100 AURORA, CO 80010	N/A ENVIRONMENTAL EDUCATION FOR CHILDREN	OPERATING FOUNDATION	1,088.
CAROLINA FRIENDS SCHOOL 4809 FRIENDS SCHOOL ROAD DURHAM, NC 27705	N/A PROVIDE TUITION AND SALARY ASSISTANCE	SCHOOL	1,168.
CENTRAL PARK SCHOOL FOR CHILDREN 724 FOSTER ST. DURHAM, NC 27701	N/A SUPPORT OF SUNSHINE FUND AT SCHOOL	SCHOOL	1,062.
CHERRY HILLS VILLAGE ELEMENTARY SCHOOL 4700 YOSEMITE ST GREENWOOD VILLAGE, CO 80111	N/A OPERATING EXPENSES	SCHOOL	6,506.
CHILDREN'S HOSPITAL FOUNDATION 13123 EAST 16TH AVE. AURORA, CO 80045	N/A HEALTHCARE FOR CHILDREN IN WESTERN STATES	OTHER CHARITY	1,000.
CHILDREN'S HOSPITAL FOUNDATION 13123 EAST 16TH AVE. AURORA, CO 80045	N/A HEALTHCARE FOR CHILDREN IN WESTERN STATES	OTHER CHARITY	2,069.

CAROLYN W. & CHARLES T. BEAIRD	FAMILY F		72-6027212
CINCO DE MAYO INC PO BOX 53067 SHREVEPORT, LA 71135	N/A LA CIMA:TEACH BILINGUAL LITERARY TO HISPANICS	OTHER CHARITY	10,000.
COLFAX COMMUNITY NETWORK INC PO BOX 202373 DENVER, CO 80220	N/A OPERATING EXPENSES	OTHER CHARITY	100.
COLORADO STORM SOCCER 7002 S. REVERE PKWY,STE 60 CENTENNIAL, CO 80112	N/A OPERATING EXPENSES	OTHER CHARITY	1,639.
COMMUNITY RENEWAL INTERNATIONAL INC PO BOX 4678 SHREVEPORT, LA 71134	N/A OPERATING EXPENSES FOR ALLENDALE FRIENDSHIP HOUSE	OTHER CHARITY	10,000.
COUNCIL ON ALCOHOL & DRUG ABUSE 2000 FAIRFIELD AVE SHREVEPORT, LA 71104	N/A ROOF,COMPUTERES,BEDDIN - CAVANAUGH CENTER	OTHER CHARITY	29,800.
DEMOCRACY NORTH CAROLINA 1821 GREEN ST. DURHAM, NC 27705	N/A TRAIN YOUTH IN WORKINGS OF DEMOCRACY	OTHER CHARITY	500.
DEMOCRACY NORTH CAROLINA 1821 GREEN ST. DURHAM, NC 27705	N/A TRAIN YOUTH IN WORKINGS OF DEMOCRACY	OTHER CHARITY	61.
DENVER AREA BOY SCOUTS:CUB SCOUTS PACK 55 10455 W. 6TH AVE.STE 100 DENVER, CO 80215-5633	N/A OPERATING EXPENSES	OTHER CHARITY	922.
DENVER COMMUNITY LEADERSHIP FORUM 2261 JASMINE ST. DENVER, CO 80207	N/A OPERATING EXPENSES	OTHER CHARITY	61.
DENVER ZOO 2300 STEELE ST. DENVER, CO 80205	N/A SUPPORT SCIENTIFIC & ZOOLOGICAL RESOURCES	OTHER CHARITY	84.

FOOD ALLERGY & ANAPHYLAXIS NETWORK 11781 LEE JACKSON HWY, #160 FAIRFAX, VA 22033	N/A HOUSTON TX WALK FOR FOOD	OTHER CHARITY	1,000.
FOOD BANK OF NORTHWEST LOUISIANA 2307 TEXAS ST. SHREVEPORT, LA 71103	N/A NATURAL GAS-POWERED GENERATOR	OTHER CHARITY	43,458.
FORENSIC NURSE EXAMINERS OF LA., INC. P.O. BOX 44466 SHREVEPORT, LA 71134	N/A TRAIN & EQUIP SEXUAL ASSAULT NURSES	OTHER CHARITY	15,000.
FRIENDS OF STATE PARKS (NORTH CAROLINA) PO BOX 37655 RALEIGH, NC 27627	N/A OPERATING EXPENSES	OTHER CHARITY	1,000.
FRIENDS OF STATE PARKS (NORTH CAROLINA) PO BOX 37655 RALEIGH, NC 27627	N/A OPERATING EXPENSES	OTHER CHARITY	123.
GARDEN WRITERS ASSN FOUNDATION 10210 LEATHERLEAF CT. MANASSAS, VA 20111	N/A PLANT A ROW FOR THE HUNGRY	OTHER CHARITY	164.
GERMANTOWN PRESBYTERIAN CHURCH 2363 GERMANTOWN RD S. GERMANTOWN, TN 38138	N/A OPERATING EXPENSES	OTHER CHARITY	3,073.
GINGERBREAD HOUSE 1700 BUCKNER SQ, STE 101 SHREVEPORT, LA 71101	N/A CHILD VICTIMS OF SEXUAL & PHYSICAL ASSAULT	OTHER CHARITY	15,000.
HABITAT FOR HUMANITY OF DURHAM NC 215 N. CHURCH ST. DURHAM, NC 27701	N/A ROBERT DAYE HOUSE	OTHER CHARITY	1,000.
HARTFORD HOSPITAL/GRAY CANCER CENTER PO BOX 5037 HARTFORD, CT 06102-5037	N/A OPERATING EXPENSES	OTHER CHARITY	25.

HOLY ANGELS RESIDENTIAL FACILITY 10450 ELLERBE RD. SHREVEPORT, LA 71106	N/A COMMERCIAL SHREDDERS FOR RESIDENTIAL WORK ACTIVITY CENTER	OTHER CHARITY	10,000.
INNER CITY ROW MODERN DANCE CO. 512 WALL ST. SHREVEPORT, LA 71101	N/A RENOVATION OF LA'S OLDEST ALL BLACK DANCE CO. FACILITY	OTHER CHARITY	6,000.
JUDI'S HOUSE 1741 GAYLORD ST. DENVER, CO 80206	N/A PROGRAM FOR GRIEVING CHILDREN	OTHER CHARITY	250.
KIDS VOTING DURHAM 721 FOSTER ST. DURHAM, NC 27701	N/A EDUCATE CHILDREN ABOUT VOTING & ELECTIONS	OTHER CHARITY	307.
LAFAYETTE CATHOLIC SERVICES, INC. P.O. BOX 3177 LAFAYETTE, LA 70501	N/A FEEDING THE POOR: "ST. JOSEPH'S DINER"	OTHER CHARITY	500.
LAKE COMMUNITY DEVELOPMENT CORP. 700 PIERRE AVE SHREVEPORT, LA 71103	N/A AFTER SCHOOL PROGRAM FOR UNDERPRIVILEGED YOUTH	OTHER CHARITY	10,000.
LOUISIANA ASSN. OF NONPROFIT ORGANIZATIONS (NORTH) 2924 KNIGHT ST. SHREVEPORT, LA 71105	N/A PROGRAMS TO STRENGTHEN NON-PROFIT ORGANIZATIONS	OTHER CHARITY	10,000.
MAKE-A-WISH FOUNDATION 1780 MORIAH WOODS BLVD. MEMPHIS, TN 38117	N/A PROVIDE UP-LIFTING EXPERIENCES FOR DYING CHILDREN	OPERATING FOUNDATION	184.
MARTIN LUTHER KING HEALTH CENTER 1233 SPRAGUE ST. SHREVEPORT, LA 71101	N/A RENOVATE FREE CLINIC & PHARMACY	OTHER CHARITY	25,000.
MCCALLIE SCHOOL 500 DODDS AVE, MEMPHIS, TN 37404	N/A OPERATING EXPENSES	SCHOOL	123.

MEADOWS MUSEUM OF ART 2911 CENTENARY BLVD. SHREVEPORT, LA 71104	N/A "EDUCATION THROUGH ART" IN PUBLIC SCHOOLS	OTHER CHARITY	15,000.
MED CAMPS OF LOUISIANA 102 THOMAS RD., STE 615 W. MONROE, LA 71291	N/A RENOVATE FACILITY FOR CHILDREN WITH PHYSICAL OR MENTAL DISORDERS	OTHER CHARITY	10,000.
MEMPHIS UNION MISSION PO BOX 1938 MEMPHIS, TN 38101	N/A OPERATING EXPENSES	OTHER CHARITY	246.
MEMPHIS UNIVERSITY SCHOOL LIBRARY 6191 PARK AVE. MEMPHIS, TN 38119	N/A OPERATING EXPENSES	SCHOOL	61.
MEMPHIS UNIVERSITY SCHOOL 6191 PARK AVE. MEMPHIS, TN 38119	N/A OPERATING EXPENSES	SCHOOL	1,229.
MID SOUTH FOOD BANK 239 SOUTH DUDLEY MEMPHIS, TN 38104	N/A OPERATING EXPENSES	OTHER CHARITY	123.
MIRACLES ON ICE-HOWARD FAMILY FOUNDATION 9 WATERSIDE TERRACE ENGLEWOOD, CO 80113	N/A CAMP FOR INNER CITY YOUTH	OTHER CHARITY	164.
MISSION HILLS EARLY LEARNING CENTER 5859 S. UNIVERSITY BLVD. GREENWOOD VILLAGE, CO 80121	N/A OPERATING EXPENSES	SCHOOL	983.
MOMS CLUB OF WEST HARTFORD, CONARD CHAPTER 45 CHERRYFIELD DR. WEST HARTFORD, CT 06107	N/A SUPPORT FOR STAY-AT-HOME MOTHERS & THEIR CHILDRENS	OTHER CHARITY	328.
NEKO HAMLETT MEMORIAL FUND C/O PLAINS CAPITAL BANK, PO BOX 271 LUBBOCK, TX 79408	N/A OPERATING EXPENSES	OTHER CHARITY	615.

NORTHERN & CENTRAL LA. INTERFAITH P. O. BOX 44374 SHREVEPORT, LA 71134-4374	N/A SUPPORT COMMUNITY ORGANIZING/ADVOCACY WORK IN NW LA.	OTHER CHARITY	15,000.
NORTHWEST LOUISIANA ECONOMIC DEVELOPMENT FOUNDATION 400 EDWARDS ST. SHREVEPORT, LA 71101	N/A CONNECT JOB-SEEKERS WITH POTENTIAL EMPLOYERS	OPERATING FOUNDATION	10,000.
ONE GREAT RIVER P. O. BOX 44349 SHREVEPORT, LA 71134-4349	N/A YOUTH ADVENTURE PROGRAMS TO PREVENT TOBACCO/ALCOHOL	OTHER CHARITY	7,500.
PARTNERS IN HEALTH 641 HUNTINGTON BOSTON, MA 02115	N/A INTERNATIONAL HEALTH CARE	OTHER CHARITY	2,000.
PEDIATRIC CANCER FOUNDATION PO BOX 785 MAMRONECK, NY 10543	N/A OPERATING EXPENSES	OTHER CHARITY	61.
PHILADELPHIA CENTER P. O. BOX 44454 SHREVEPORT, LA 711344454	N/A ASSISTANCE TO PERSONS WITH HIV/AIDS	OTHER CHARITY	500.
PHILADELPHIA CENTER P. O. BOX 44454 SHREVEPORT, LA 711344454	N/A ASSISTANCE TO PERSONS WITH HIV/AIDS	OTHER CHARITY	15,000.
PLANNED PARENTHOOD OF CENTAL NORTH CAROLINA P.O. BOX 3258 CHAPEL HILL, NC 27515	N/A EXPANSION CAMPAIGN FOR FAMILY HEALTH PROGRAMS	OTHER CHARITY	1,000.
PLAYAZ AND PLAYETTES 720 HOPE ST SHREVEPORT, LA 711013319	N/A MOBILE RECORDING EQUIPMENT & MUSIC PROGRAMS	OTHER CHARITY	10,000.
POLARIS PARENT TEACHER ORGANIZATION 410 PARK AVENUE WEST DENVER, CO 80205	N/A OPERATING EXPENSES	OTHER CHARITY	100.

POLARIS PARENT TEACHER ORGANIZATION 410 PARK AVENUE WEST DENVER, CO 80205	N/A OPERATING EXPENSES	OTHER CHARITY	150.
PROVIDENCE HOUSE 814 COTTON ST. SHREVEPORT, LA 71101	N/A RENT, UTILITIES & PROGRAM SUPPORT FOR SAFE HOUSE	OTHER CHARITY	15,000.
RED RIVER FILM SOCIETY 617 TEXAS ST. SHREVEPORT, LA 71101	N/A ADDITION OF MULTI-MEDIA VIDEO CONFERENCE CAPABILITY	OTHER CHARITY	10,000.
RHODES COLLEGE 2000 N. PARKWAY MEMPHIS, TN 38112	N/A OPERATING EXPENSES	SCHOOL	123.
RIVER CITY REPERTORY THEATRE 2829 YOUREE DR., SUITE 4 SHREVEPORT, LA 71104	N/A THEATRICAL PRODUCTIONS	OTHER CHARITY	500.
RIVER CITY REPERTORY THEATRE 2829 YOUREE DR., SUITE 4 SHREVEPORT, LA 71104	N/A THEATRICAL PRODUCTIONS	OTHER CHARITY	2,000.
RIVER OAKS ELEMENTARY PTO 2008 KIRBY DR. HOUSTON, TX 77019	N/A OPERATING EXPENSES	OTHER CHARITY	860.
RIVER OAKS ELEMENTARY PTO 2008 KIRBY DR. HOUSTON, TX 77019	N/A OPERATING EXPENSES	OTHER CHARITY	2,000.
ROBINSON FILM CENTER PO BOX 155 SHREVEPORT, LA 71161	N/A EDUCATION	OTHER CHARITY	500.
SALUS WORLD 2129 13TH ST., STE H BOULDER, CO 80302	N/A OPERATING EXPENSES	OTHER CHARITY	1,000.

SALVATION ARMY 696 JACKSON AVE. MEMPHIS, TN 38105-2006	N/A OPERATING EXPENSES	OTHER CHARITY	123.
SEMESTER AT SEA PO BOX 400885 CHARLOTTESVILLE, VA 22904-4885	N/A OPERATING EXPENSES	OTHER CHARITY	123.
SHREVEPORT GREEN 3625 SOUTHERN AVE. SHREVEPORT, LA 71104	N/A OPERATING EXPENSES	OTHER CHARITY	250.
SHREVEPORT GREEN 3625 SOUTHERN AVE. SHREVEPORT, LA 71104	N/A OPERATING EXPENSES	OTHER CHARITY	10,000.
SOMERSET HILLS LEARNING INSTITUTE 1810 BURNT MILLS RD. BEDMINSTER, NJ 07921	N/A OPERATING EXPENSES	SCHOOL	61.
ST. CATHERINE'S COMMUNITY CENTER 331 EAST 71ST ST. SHREVEPORT, LA 711064305	N/A AFTER SCHOOL PROGRAM FOR AT-RISK CHILDREN	OTHER CHARITY	15,000.
STRATEGIC ACTION COUNCIL OF NW LOUISIANA PO BOX 1910 SHREVEPORT, LA 71166	N/A IMPLEMENT START-UPS & EXPANSION OF MINORITY BUSINESSES	OTHER CHARITY	25,000.
THE CENTER FOR FAMILIES 864 OLIVE ST. SHREVEPORT, LA 71104	N/A DEVELOP PROGRAMS FOR PERSONS RAISING OTHER PEOPLE'S CHILDREN	OTHER CHARITY	10,000.
THE CHAMBERS CENTER/WOMEN'S FOUNDATION OF COLORADO 1901 EAST ASBURY AVE. DENVER, CO 80208	N/A OPERATING EXPENSES	OTHER CHARITY	61.
THE DAVID IFSHIN MEMORIAL FUND 10621 SOUTH GLEN ROAD POTOMAC, MD 20854	N/A OPERATING EXPENSES	OTHER CHARITY	31.

THE FOUNDATION FOR THEIR SAKE 5 CHERRY HILLS FARM CT. ENGLEWOOD, CO 80113	N/A OPERATING EXPENSES	OPERATING FOUNDATION	1,000.
THE LOGAN SCHOOL 1005 YOSEMITE ST. DENVER, CO 80205	N/A OPERATING EXPENSES	SCHOOL	333.
THE LOGAN SCHOOL 1005 YOSEMITE ST. DENVER, CO 80230	N/A OPERATING EXPENSES	SCHOOL	154.
THE ODYSSEY SCHOOL 8750 E. 28TH DENVER, CO 80238	N/A OPERATING EXPENSES	SCHOOL	300.
THE ODYSSEY SCHOOL 8750 E. 28TH DENVER, CO 80238	N/A OPERATING EXPENSES	SCHOOL	328.
THE ROSE FOUNDATION/JEWISH WOMEN'S FUND OF COLORADO 600 SOUTH CHERRY ST., #1200 DENVER, CO 802461712	N/A HELPING WOMEN BECOME CATALYSTS FOR CHANGE	OTHER CHARITY	676.
TRUTHOUT P.O. BOX 231278 ENCINITAS, CA 92023	N/A SUPPORT INDEPENDENT NEWS COVERAGE	OTHER CHARITY	500.
TRUTHOUT P.O. BOX 231278 ENCINITAS, CA 92023	N/A SUPPORT INDEPENDENT NEWS COVERAGE	OTHER CHARITY	123.
U.S. OLYMPIC COMMITTEE 1 OLYMPIC PLACE COLORADO SPRINGS, CO 80909-5746	N/A OPERATING EXPENSES	OTHER CHARITY	61.
UNC TV P. O. BOX 14920 RTP, NC 277094920	N/A SUPPORT OF PUBLIC TELEVISION	OTHER CHARITY	43.

CAROLYN W. & CHARLES T. BEAIRD	FAMILY F		72-6027212
UNIVERSITY OF DENVER/STURM COLLEGE OF LAW 2255 EAST EVENS AVE. DENVER, CO 80208	N/A OPERATING EXPENSES	SCHOOL	61.
UNIVERSITY OF MEMPHIS FOUNDATION PO BOX 1000 MEMPHIS, TN 38148	N/A OPERATING EXPENSES	OTHER CHARITY	6,453.
UNIVERSITY OF PENNSYLVANIA LAW SCHOOL 3400 CHESNUT ST. PHILADELPHIA, PA 19104	N/A OPERATING EXPENSES	SCHOOL	164.
USO PO BOX 96860 WASHINGTON, DC 20090	N/A OPERATING EXPENSES	OTHER CHARITY	61.
VAIL MOUNTAIN RESCUE GROUP PO BOX 1597 VAIL, CO 81658	N/A OPERATING EXPENSES	OTHER CHARITY	31.
VOLUNTEERS FOR YOUTH JUSTICE 900 JORDAN SHREVEPORT, LA 71101	N/A SCHOOL FIGHT DIVERSION PROGRAM	OTHER CHARITY	40,000.
VOLUNTEERS FOR YOUTH JUSTICE 900 JORDAN SHREVEPORT, LA 71101	N/A SCHOOL FIGHT DIVERSION PROGRAM	OTHER CHARITY	1,000.
VOLUNTEERS FOR YOUTH JUSTICE 900 JORDAN SHREVEPORT, LA 71101	N/A SCHOOL FIGHT DIVERSION PROGRAM	OTHER CHARITY	500.
VOLUNTEERS FOR YOUTH JUSTICE 900 JORDAN SHREVEPORT, LA 71101	N/A DETER CHILDREN FROM CRIMINAL ACTIVITIES	OTHER CHARITY	1,000.
VOLUNTEERS OF AMERICA-HIGHLAND CENTER 520 OLIVE ST. SHREVEPORT, LA 71104	N/A NEIGHBORS TO NEIGHBORS PROGRAM	OTHER CHARITY	500.

VOLUNTEERS OF AMERICA-HIGHLAND CENTER 520 OLIVE ST. SHREVEPORT, LA 71104	N/A TRANSITIONAL LIVING CENTER FOR HOMELESS YOUTH	OTHER CHARITY	25,000.
VOLUNTEERS OF AMERICA-HIGHLAND HAVEN 520 OLIVE ST. SHREVEPORT, LA 71104	N/A CAPITAL IMPROVEMENTS TO RESIDENCE FOR "AGED OUT" FOSTER CARE FEMALES	OTHER CHARITY	20,000.
WEST DENVER PREPARTORY ACADEMY 1825 S. FEDERAL BLVD. DENVER, CO 80219	N/A OPERATING EXPENSES	SCHOOL	100.
WEST DENVER PREPARTORY ACADEMY 1825 S. FEDERAL BLVD. DENVER, CO 80219	N/A OPERATING EXPENSES	SCHOOL	61.
WOODLAND PRESBYTERIAN SCHOOL 5217 PARK AVE. MEMPHIS, TN 38119	N/A EDUCATION PROGRAMS	SCHOOL	17,475.
YOUTH ENRICHMENT PROGRAM 4700 LINE AVE., STE 207 SHREVEPORT, LA 71106	N/A EDUCATIONAL AFTER SCHOOL PROGRAM	OTHER CHARITY	4,000.

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

626,255.
