Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , 2009, and ending , 20

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: SAM VIERSEN FAMILY FOUNDATION, INC.

A Employer identification number: 73-1295358

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 702708 — Room/suite:

B Telephone number (see page 10 of the instructions): (918) 742-1979

City or town, state, and ZIP code: TULSA, OK 74170

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: [X] 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)* ▶ $ 21,584,275.

J Accounting method: [X] Cash [ ] Accrual [ ] Other (specify) ________ *(Part I, column (d) must be on cash basis.)*

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) (see page 11 of the instructions).)*

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income N/A	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check ▶ [ ] if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	252,827.	252,827.		ATCH 1
4	Dividends and interest from securities	371,432.	371,432.		ATCH 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	-867,451.			
b	Gross sales price for all assets on line 6a 8,670,631.				
7	Capital gain net income (from Part IV, line 2)				
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	**Total.** Add lines 1 through 11	-243,192.	624,259.		
13	Compensation of officers, directors, trustees, etc	93,881.	28,164.		65,717.
14	Other employee salaries and wages				
15	Pension plans, employee benefits	9,890.	2,967.		6,923.
16a	Legal fees (attach schedule) ATCH 3	527.	158.	0.	369.
b	Accounting fees (attach schedule) ATCH 4	8,053.	4,027.	0.	4,026.
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see page 14 of the instructions) **	24,466.	19,450.		5,016.
19	Depreciation (attach schedule) and depletion	1,000.			
20	Occupancy	12,278.	3,684.		8,594.
21	Travel, conferences, and meetings	96.			96.
22	Printing and publications				
23	Other expenses (attach schedule) ATCH 6	190,896.	158,336.		34,854.
24	**Total operating and administrative expenses.** Add lines 13 through 23	341,087.	216,786.	0.	125,595.
25	Contributions, gifts, grants paid	757,366.			757,366.
26	Total expenses and disbursements Add lines 24 and 25	1,098,453.	216,786.	0.	882,961.
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	-1,341,645.			
b	**Net investment income** (if negative, enter -0-)		407,473.		
c	**Adjusted net income** (if negative, enter -0-)			-0-	

Revenue (lines 1–12); Operating and Administrative Expenses (lines 13–26)

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Part II Balance Sheets — Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets			
1 Cash - non-interest-bearing	957,227.	642,438.	642,438.
2 Savings and temporary cash investments			
3 Accounts receivable ▶			
Less. allowance for doubtful accounts ▶			
4 Pledges receivable ▶			
Less allowance for doubtful accounts ▶			
5 Grants receivable			
6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
7 Other notes and loans receivable (attach schedule) ▶			
Less: allowance for doubtful accounts ▶			
8 Inventories for sale or use			
9 Prepaid expenses and deferred charges			
10 a Investments - U S and state government obligations (attach schedule)	1,176,000.	2,289,000.	2,334,523.
b Investments - corporate stock (attach schedule)	17,324,942.	16,418,187.	16,191,662.
c Investments - corporate bonds (attach schedule)	3,423,000.	2,063,000.	2,230,267.
11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation (attach schedule) ▶			
12 Investments - mortgage loans			
13 Investments - other (attach schedule) ATCH 7	227,671.	227,671.	227,671.
14 Land, buildings, and equipment basis ▶ 7,000.			
Less accumulated depreciation (attach schedule) ▶ 5,583.	2,417.	1,417.	
15 Other assets (describe ▶ ATCH 8)	-161,967.	-42,286.	-42,286.
16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	22,949,290.	21,599,427.	21,584,275.
Liabilities			
17 Accounts payable and accrued expenses	6,633.		
18 Grants payable			
19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons			
21 Mortgages and other notes payable (attach schedule)			
22 Other liabilities (describe ▶)	983.		
23 **Total liabilities** (add lines 17 through 22)	7,616.		
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			
28 Paid-in or capital surplus, or land, bldg, and equipment fund	11,000.	11,000.	
29 Retained earnings, accumulated income, endowment, or other funds	22,930,674.	21,588,427.	
30 **Total net assets or fund balances** (see page 17 of the instructions)	22,941,674.	21,599,427.	
31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	22,949,290.	21,599,427.	

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	22,941,674.
2 Enter amount from Part I, line 27a	2	-1,341,645.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	21,600,029.
5 Decreases not included in line 2 (itemize) ▶ ATTACHMENT 9	5	602.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	21,599,427.

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	SEE PART IV SCHEDULE			
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				
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	-867,451.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8.		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see page 18 of the 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	1,200,470.	24,033,997.	0.049949
2007	1,293,293.	28,334,083.	0.045644
2006	1,282,689.	23,389,888.	0.054839
2005	1,015,250.	23,883,276.	0.042509
2004	1,211,333.	23,676,653.	0.051161

2	**Total** of line 1, column (d)	2	0.244102
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.048820
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	19,482,153.
5	Multiply line 4 by line 3	5	951,119.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	4,075.
7	Add lines 5 and 6	7	955,194.
8	Enter qualifying distributions from Part XII, line 4	8	882,961.

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 on page 18.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ____________ (attach copy of ruling 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	8,149.
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3	Add lines 1 and 2		3	8,149.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-		5	8,149.
6	Credits/Payments:			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a 1,600.		
b	Exempt foreign organizations-tax withheld at source	6b 0.		
c	Tax paid with application for extension of time to file (Form 8868)	6c 0.		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments Add lines 6a through 6d		7	1,600.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☒ if Form 2220 is attached		8	179.
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	6,728.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ **Refunded** ▶		11	

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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation ▶ $ N/A (2) On foundation managers ▶ $ N/A			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ N/A			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		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?	6	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*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ OK,			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	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 on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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 page 20 of the 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 ▶ N/A

14 The books are in care of ▶ I.R. ROBERTSON Telephone no ▶ 918-742-1979

Located at ▶ 7130 S. LEWIS, SUITE 200, TULSA, OK ZIP + 4 ▶ 74170

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)?		1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
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 ▶ ________, ________, ________, ________				
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 page 20 of the instructions.)		2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ________, ________, ________, ________				
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.)*		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)? (see page 22 of the instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? 5b

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b No: 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? 7b

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(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
ATTACHMENT 10		93,881.	31,235.	9,063.

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions). 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 ▶

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

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

Total number of others receiving over $50,000 for professional services ▶ NONE

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 (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3 NONE	
Total. Add lines 1 through 3 ▶	

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Part X **Minimum Investment Return** (All domestic foundations must complete this part Foreign foundations, see page 24 of the 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	19,003,239.
b	Average of monthly cash balances	1b	729,871.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	45,726.
d	**Total** (add lines 1a, b, and c)	1d	19,778,836.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	19,778,836.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	296,683.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	19,482,153.
6	**Minimum investment return.** Enter 5% of line 5	6	974,108.

Part XI **Distributable Amount** (see page 25 of the 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	974,108.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	8,149.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	8,149.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	965,959.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	965,959.
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	965,959.

Part XII **Qualifying Distributions** (see page 25 of the 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	882,961.
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	0.
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	882,961.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	N/A
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	882,961.

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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				965,959.
2 Undistributed income, if any, as of the end of 2009.				
a Enter amount for 2008 only			18,141.	
b Total for prior years 20 07 ,20 06 ,20 05				
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008 0.				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 882,961.				
a Applied to 2008, but not more than line 2a			18,141.	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d Applied to 2009 distributable amount				864,820.
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				
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				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				101,139.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
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 0.				

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Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling . . . . ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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(j)(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 (j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income .					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year - see page 28 of the instructions.)

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))

SAM K. VIERSEN (NOW DECEASED)

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 page 28 of the 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

ATTACHMENT 11

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

NONE SPECIFIED

c Any submission deadlines

NONE

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

NONE, EXCEPT MUST QUALIFY 501(C)(3) ORGANIZATION

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* CONTRIBUTIONS, GIFTS, ETC. SEE ATTACHMENT 14				757,366.
Total . . . . ▶ **3a**				757,366.
b *Approved for future payment* N/A				
Total . . . . ▶ **3b**				

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Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income (See page 28 of the instructions.)
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			14	252,827.	
4 Dividends and interest from securities			14	371,432.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	-867,451.	
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)				-243,192.	

13 Total. Add line 12, columns (b), (d), and (e) . . . . . 13 -243,192.

(See worksheet in line 13 instructions on page 28 to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions.)
	NOT APPLICABLE

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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
	N/A		N/A

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

b If "Yes," complete the following schedule

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Signature of officer or trustee: [signature] Date: 5/13/10 Title: Executive Director

Paid Preparer's Use Only

Preparer's signature: [signature]	Date: 5-13-10	Check if self-employed ☐	Preparer's identifying number (See Signature on page 30 of the instructions)
Firm's name (or yours if self-employed), address, and ZIP code: GRANT THORNTON LLP 2431 E. 61ST STREET, SUITE 500 TULSA, OK 74136-1208		EIN ▶ 36-6055558 Phone no 918-877-0800	

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Form 4562 | Department of the Treasury Internal Revenue Service (99)

Depreciation and Amortization
(Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172 | 2009 | Attachment Sequence No 67

Name(s) shown on return: SAM VIERSEN FAMILY FOUNDATION, INC.

Identifying number: 73-1295358

Business or activity to which this form relates: GENERAL DEPRECIATION

Part I Election To Expense Certain Property Under Section 179

Note: *If you have any listed property, complete Part V before you complete Part I.*

1	Maximum amount See the instructions for a higher limit for certain businesses	1	
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	
4	Reduction in limitation Subtract line 3 from line 2 If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions	5	

6 (a) Description of property	(b) Cost (business use only)	(c) Elected cost

7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction Enter the **smaller** of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2008 Form 4562	10	
11	Business income limitation Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	
12	Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2010. Add lines 9 and 10, less line 12 ▶	13	

Note: *Do not use Part II or Part III below for listed property. Instead, use Part V*

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instructions.)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	1,000.

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2009	17	
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ▶ ☐		

Section B - Assets Placed in Service During 2009 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27 5 yrs	MM	S/L	
			27.5 yrs.	MM	S/L	
i Nonresidential real property			39 yrs	MM	S/L	
				MM	S/L	

Section C - Assets Placed in Service During 2009 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year			40 yrs	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property Enter amount from line 28	21	
22	**Total.** Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instructions	22	1,000.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V **Listed Property** (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement.)

Note: *For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete* **only** *24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.*

Section A - Depreciation and Other Information (Caution: *See the instructions for limits for passenger automobiles.*)

24a Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No | 24b If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see instructions)						25		
26 Property used more than 50% in a qualified business use								
		%						
		%						
		%						
27 Property used 50% or less in a qualified business use								
		%				S/L -		
		%				S/L -		
		%				S/L -		
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1						28		
29 Add amounts in column (i), line 26 Enter here and on line 7, page 1							29	

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle 1		(b) Vehicle 2		(c) Vehicle 3		(d) Vehicle 4		(e) Vehicle 5		(f) Vehicle 6	
30 Total business/investment miles driven during the year (**do not** include commuting miles)												
31 Total commuting miles driven during the year												
32 Total other personal (noncommuting) miles driven												
33 Total miles driven during the year Add lines 30 through 32												
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
34 Was the vehicle available for personal use during off-duty hours?												
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use?												

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who **are not** more than 5% owners or related persons (see instructions)

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use? (See instructions)		

Note: *If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles*

Part VI **Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2009 tax year (see instructions)					
43 Amortization of costs that began before your 2009 tax year				43	
44 **Total.** Add amounts in column (f) See the instructions for where to report				44	

2009

Description of Property

GENERAL DEPRECIATION

DEPRECIATION

Asset description	Date placed in service	Unadjusted Cost or basis	Bus. %	179 exp. reduction in basis	Basis Reduction	Basis for depreciation	Beginning Accumulated depreciation	Ending Accumulated depreciation	Me-thod	Conv	Life	ACRS class	MA CRS class	Current-year 179 expense	Current-year depreciation
FURNITURE	06/01/2004	7,000.	100.000			7,000	4,583	5,583.	SL		7 000				1,000
Less. Retired Assets															
Subtotals		7,000.				7,000.	4,583	5,583.							1,000

Listed Property

Asset description	Date placed in service	Unadjusted Cost or basis	Bus. %	179 exp. reduction in basis	Basis Reduction	Basis for depreciation	Beginning Accumulated depreciation	Ending Accumulated depreciation	Me-thod	Conv	Life	ACRS class	MA CRS class	Current-year 179 expense	Current-year depreciation
Less. Retired Assets															
Subtotals															
TOTALS		7,000.				7,000	4,583.	5,583							1,000

AMORTIZATION

Asset description	Date placed in service	Cost or basis	Accumulated amortization	Ending Accumulated amortization	Code	Life	Current-year amortization
TOTALS							

*Assets Retired
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FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		FREEMAN #0900 PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
184,006.		78,259.					105,747.	
		BRANDES #06299 PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
361,884.		627,674.					-265,790.	
		HORIZON #0137 PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
813,098.		1,224,901.					-411,803.	
		PREFERRED #11827 PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
302,345.		332,562.					-30,217.	
		SKAGGS #06298 PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
1,518,755.		1,580,709.					-61,954.	
		WESTPORT POTOMOC #9580 PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
33,101.		207,149.					-174,048.	
		SEIX FIXED INCOME #6298 PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
5,457,442.		5,486,828.					-29,386.	
TOTAL GAIN(LOSS)		....					-867,451.	

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INTEREST INCOME	252,827.	252,827.
TOTAL	252,827.	252,827.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
DIVIDENDS		371,432.	371,432.
	TOTAL	371,432.	371,432.

FORM 990PF, PART I - LEGAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
LEGAL FEES	527.	158.		369.
TOTALS	527.	158.	0.	369.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ACCOUNTING FEES	8,053.	4,027.		4,026.
TOTALS	8,053.	4,027.	0.	4,026.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
PAYROLL TAXES	7,166.	2,150.	5,016.
FOREIGN TAXES	17,300.	17,300.	
TOTALS	24,466.	19,450.	5,016.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
INSURANCE	23,532.	7,060.	16,472.
PHONE	2,379.	714.	1,665.
OFFICE SUPPLIES/POSTAGE	758.	227.	531.
DUES & SUBSCRIPTIONS	4,196.		4,196.
VEHICLE EXPENSE	3,981.	1,194.	2,787.
BROKERAGE FEES & COMMISSIONS	145,915.	145,915.	
MISC. CONTRACT SERVICES	1,675.		1,675.
MEALS & ENTERTAINMENT	2,206.	662.	1,544.
MISC. GENERAL EXPENSES	8,548.	2,564.	5,984.
FEDERAL TAX EXPENSE	-2,294.		
TOTALS	190,896.	158,336.	34,854.

FORM 990PF, PART II - OTHER INVESTMENTS

ATTACHMENT 7

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
PS - SB COMMUNICATION FUND	227,671.	227,671.
TOTALS	227,671.	227,671.

FORM 990PF, PART II - OTHER ASSETS

ATTACHMENT 8

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
BOND DISCOUNTS	-139,696.	-139,696.
BOND PREMIUMS	97,410.	97,410.
TOTALS	-42,286.	-42,286.

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION		AMOUNT
TELEMIG CELL REDEMPTION		602.
	TOTAL	602.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
MARALYNN V. SANT 7130 SOUTH LEWIS, SUITE 200 TULSA, OK 74170	DIRECTOR/PRESIDENT			
LEO M. SANT 7130 SOUTH LEWIS, SUITE 200 TULSA, OK 74170	DIRECTOR			
BRIAN C. JOHNSON 62 N B STREET SALT LAKE CITY, UT 84103	DIRECTOR			
JILL JOHNSON P.O. BOX 770-PMB 214 PARK CITY, UT 84060	DIRECTOR			
JULIE SCHENK 1800 KINGS CLIFF ROAD KIRKWOOD, MO 63122	DIRECTOR			
ROBERT ENGLISH P.O. BOX 130 OKMULGEE, OK 74447	DIRECTOR			

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 10 (CONT'D)

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
JENNIFER MILLER BOX 1210 ASHLAND, OR 97520	DIRECTOR			
I.R. ROBERTSON 805 CARDINAL LANE OKMULGEE, OK 74447	EXECUTIVE DIRECTOR 40.00	93,881.	31,235.	9,063.
MARGARET ROBINSON 1904 VALLEYVIEW ROAD OKMULGEE, OK 74447	DIRECTOR			
	GRAND TOTALS	93,881.	31,235.	9,063.

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

I.R. ROBERTSON
7130 S. LEWIS, SUITE 200
TULSA, OK 74170
918-742-1979

Schedule of Appropriations and Payments Fiscal Year 2009

12/31/2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
Agape Pregnancy Center of Okmulgee 114 North Grand Okmulgee, OK 74447 *OPERATING EXPENSE* $10,000.00 2009		$0.00	$10,000.00	$0.00	$10,000.00	$0.00
Agape Pregnancy Center of Okmulgee 114 North Grand Okmulgee, OK 74447 *MR DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
AMERICAN LEGION OF OKMULGEE 611 SOUTH SEMINOLE OKMULGEE, OKLAHOMA 74447 *SUMMER BASEBALL PROGRAM* $3,000.00 2009		$0.00	$3,000.00	$0.00	$3,000.00	$0.00
AMERICAN LEGION OF OKMULGEE 611 SOUTH SEMINOLE OKMULGEE, OKLAHOMA 74447 *BOYS STATE SPONSORSHIP* $175.00 2009		$0.00	$175.00	$0.00	$175.00	$0.00
BIO-TECH ACADEMY *BAYLEE DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
BOY SCOUTS OF AMERICA 3206 SOUTH PEORIA TULSA, OKLAHOMA 74105 *ANNUAL OKMULGEE SUPPORT* $6,000.00 2009		$0.00	$6,000.00	$0.00	$6,000.00	$0.00
BRIGHAM YOUNG UNIVERSITY BOX 27188 PROVO, UTAH 84602 *JS DISCRETIONARY JANET SCHOLARSHIP* $3,000.00 2009		$0.00	$3,000.00	$0.00	$3,000.00	$0.00
BRIGHAM YOUNG UNIVERSITY BOX 27188 PROVO, UTAH 84602 *LS DISCRETIONARY JANET SCHOLARSHIP* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
BRIGHAM YOUNG UNIVERSITY BOX 27188 PROVO, UTAH 84602 *MVS DISCRETIONARY CHESSMAN COLLECTION* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
BYU ALUMNI ASSOCIATION *LEO SANT 2008 DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
BYU ALUMNI ASSOCIATION *LS 2009 DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
BYU ALUMNI ASSOCIATION *LEO SANT DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
Camp Fire USA 706 South Boston Tulsa, OK 74119-1610 *SUMMER CAMP FOR OKMULGEE CHILDREN* $7,500.00 2009		$0.00	$7,500.00	$0.00	$7,500.00	$0.00
COMMUNITY FOOD BANK OF EASTERN OKLAHOMA *SAM MILLER DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
DUNBAR ALL SCHOOL ASSOCIATION BOX 1604 OKMULGEE, OKLAHOMA 74447 *CAPITAL IMPROVEMENTS BANNEKER* $47,660.00 2009		$0.00	$47,660.00	$0.00	$47,660.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
DUNBAR ALL SCHOOL ASSOCIATION BOX 1604 OKMULGEE, OKLAHOMA 74447 *SUMMER MULTICULTURAL PROGRAM* $12,500.00 2009		$0.00	$12,500.00	$0.00	$12,500.00	$0.00
ECO Trust *JM DISCRETIONARY* $7,500.00 2009		$0.00	$7,500.00	$0.00	$7,500.00	$0.00
ECO Trust *JM DISCRETIONARY* $2,500.00 2009		$0.00	$2,500.00	$0.00	$2,500.00	$0.00
EGYPTIAN THEATRE COMPANY PARK CITY, UTAH *JILL DISCRETIONARY* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00
EL CAMINO HOSPITAL FOUNDATION *LS DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
FRIENDS OF THE LIBRARY OKMULGEE, OK 74447 *MR DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
Happy Hands Early Childhood Development Center *Capital Campaign--3 year pledge* $150,000.00 2008		$100,000.00	$0.00	$0.00	$50,000.00	$50,000.00
HENRYETTA EDUCATION FOUNDATION 121 NORTH FOURTH HENRYETTA, OKLAHOMA 74437 *CULTURAL ENRICHMENT* $10,000.00 2009		$0.00	$10,000.00	$0.00	$10,000.00	$0.00
HUNTSMAN CANCER INSTITUTE *LS DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
KEEP THE NORTH SHORE *ELISA DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
KIRKWOOD PUBLIC LIBRARY *JS DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
LITTLE PATRIOTS EMBRACED *JS DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
MENTORS INTERNATIONAL 13751 WAESWORTH PARK DR. 13751 WADSWORTH PARK DR. SUITE 120 DRAPER, UTAH 84020 *LS DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
MENTORS INTERNATIONAL 13751 WAESWORTH PARK DR. 13751 WADSWORTH PARK DR. SUITE 120 DRAPER, UTAH 84020 *JS DISCRETIONARY* $3,000.00 2009		$0.00	$3,000.00	$0.00	$3,000.00	$0.00
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *SPRING TRI--NADJA JOHNSON* $1,500.00 2009		$0.00	$1,500.00	$0.00	$1,500.00	$0.00
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *SPRING SEMESTER CASSIE PADILLA* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *SPRING SEMESTER CRISTIN ADCOCK* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *SPRING TRI--DAYLA DOOLEY* $1,500.00 2009		$0.00	$1,500.00	$0.00	$1,500.00	$0.00
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *HIGH FIDELITY PATIENT SIMULATION SYSTEM* $146,000.00 2009		$0.00	$146,000.00	$0.00	$146,000.00	$0.00
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *DAYLA DOOLEY SUMMER SESSION* $1,500.00 2009		$0.00	$1,500.00	$0.00	$1,500.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *Fall 2009* *Cassie Padilla* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *Fall 2009* *Amber Brown* $1,500.00 2009		$0.00	$1,500.00	$0.00	$1,500.00	$0.00
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *Fall 2009* *Dayla Dooley* $1,500.00 2009		$0.00	$1,500.00	$0.00	$1,500.00	$0.00
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *Fall 2009* *Kristin Adcock* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *Fall 2009* *Miranda Prentice* $3,334.00 2009		$0.00	$3,334.00	$0.00	$3,334.00	$0.00
OKLAHOMA STATE UNIVERSITY FOUNDATION STUDENT UNION H-100 STILLWATER, OKLAHOMA 74078 *Fall 2009* *Nadja Johnson* $1,500.00 2009		$0.00	$1,500.00	$0.00	$1,500.00	$0.00
OKLAHOMA UNIVERSITY FOUNDATION 339 WEST BOYD, 101 WHITEHAND HALL NORMAN, OKLAHOMA 73019 *SPRING SEMESTER BRADLEY BROWN* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00
OKLAHOMA UNIVERSITY FOUNDATION 339 WEST BOYD, 101 WHITEHAND HALL NORMAN, OKLAHOMA 73019 *Fall 2009* *Bradley Brown* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
OKMULGEE AREA DEVELOPMENT CORP. BOX 609 OKMULGEE, OKLAHOMA 74447 *operational support--25,000 for three years* $75,000.00 2007		$25,000.00	$0.00	$0.00	$25,000.00	$0.00
OKMULGEE CHAMBER OF COMMERCE BOX 609 OKMULGEE, OKLAHOMA 74447 *2009 SUPPORT* $1,545.00 2009		$0.00	$1,545.00	$0.00	$1,545.00	$0.00
OKMULGEE CHAMBER OF COMMERCE BOX 609 OKMULGEE, OKLAHOMA 74447 *ANNUAL SUPPORT JUNIOR LIVESTOCK SALE* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
OKMULGEE COUNTY FAMILY RESOURCE CENTER BOX 73 OKMULGEE, OKLAHOMA 74447 *STRATEGIC PLAN--AREA COORDINATOR* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
OKMULGEE COUNTY FAMILY RESOURCE CENTER BOX 73 OKMULGEE, OKLAHOMA 74447 *MARGARET ROBINSON* *DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
OKMULGEE COUNTY FAMILY RESOURCE CENTER BOX 73 OKMULGEE, OKLAHOMA 74447 *MVS DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
OKMULGEE COUNTY HOMELESS SHELTER BOX 1635 OKMULGEE, OKLAHOMA 74447 *HEATING AND AC--12,300* *OPERATIONS 10,000* $12,300.00 2009		$0.00	$12,300.00	$0.00	$12,300.00	$0.00
OKMULGEE COUNTY HOMELESS SHELTER BOX 1635 OKMULGEE, OKLAHOMA 74447 *MR DISCRETIONARY* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
OKMULGEE COUNTY HUMANE SOCIETY % KATHY KENNEDY FIRST NATIONAL BANK BOX 1037 % KATHY KENNEDY OKMULGEE, OK 74447 *MVS DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
OKMULGEE COUNTY SHARKS MORRIS, OK 74445 *EXPENSES FOR STATE COMPETITION* $6,000.00 2009		$0.00	$6,000.00	$0.00	$6,000.00	$0.00
OKMULGEE COUNTY UNITED WAY BOX 1037 OKMULGEE, OKLAHOMA 74447 *2009 Annual support* $10,000.00 2009		$0.00	$10,000.00	$0.00	$10,000.00	$0.00
OKMULGEE COUNTY YMCA 106 WEST 13TH. OKMULGEE, OKLAHOMA 74447 *2009 sustaining gift* $2,500.00 2009		$0.00	$2,500.00	$0.00	$2,500.00	$0.00
OKMULGEE EDUCATION FOUNDATION BOX 464 OKMULGEE, OKLAHOMA 74447NA *CULTURAL ENRICHMENT PROGRAMS* $10,000.00 2009		$0.00	$10,000.00	$0.00	$10,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
OKMULGEE MAIN STREET *2009 SUPPORT* $1,500.00 2009		$0.00	$1,000.00	$500.00	$1,500.00	$0.00
OKMULGEE MAIN STREET *KENNEDY BLDG 40,000* *LIGHT OPERA 10,500* $10,500.00 2009		$0.00	$10,500.00	$0.00	$10,500.00	$0.00
OKMULGEE PUBLIC LIBRARY 218 SOUTH OKMULGEE OKMULGEE, OKLAHOMA 74447 *SUMMER READING PROGRAM* $6,700.00 2009		$0.00	$6,700.00	$0.00	$6,700.00	$0.00
OKMULGEE SERVICE LEAGUE BOX 913 OKMULGEE, OKLAHOMA 74447 *2009 SUPPORT* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
PEOPLE TO PEOPLE 110 SOUTH FERRAL STREET SPOKANE, WASHINGTON 99202 *TRIP TO EUROPE--ALYSSA RALEY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
RELL SUNN EDUCATIONAL FUND *ELISA DISCRETIONARAY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
ROCKY MOUNTAIN INNOCENCE CENTER *EMILY DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
SALVATION ARMY BOX 667 OKMULGEE, OKLAHOMA 74447 *MANNA DAY PROGRAM* $7,000.00 2009		$0.00	$7,000.00	$0.00	$7,000.00	$0.00
SALVATION ARMY BOX 667 OKMULGEE, OKLAHOMA 74447 *MVS DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
STONEBRIDGE ACADEMY BOX 99 OKMULGEE, OK 74447 *OPERATIONAL CONTRIBUTION* $30,000.00 2009		$0.00	$30,000.00	$0.00	$30,000.00	$0.00
STONEBRIDGE ACADEMY BOX 99 OKMULGEE, OK 74447 *OPERATIONAL FUNDING* $30,000.00 2009		$0.00	$30,000.00	$0.00	$30,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
STONEBRIDGE ACADEMY BOX 99 OKMULGEE, OK 74447 *BOB INGLISH DISCRETIONARY* $10,000.00 2009		$0.00	$10,000.00	$0.00	$10,000.00	$0.00
STONEBRIDGE ACADEMY BOX 99 OKMULGEE, OK 74447 *OPERATIONAL GRANT* $30,000.00 2009		$0.00	$30,000.00	$0.00	$30,000.00	$0.00
STONEBRIDGE ACADEMY BOX 99 OKMULGEE, OK 74447 *START UP EXPENSES PAID BY FOUNDATION* $38,389.86 2009		$0.00	$38,389.86	$0.00	$38,389.86	$0.00
STONEBRIDGE ACADEMY BOX 99 OKMULGEE, OK 74447 *BALANCE OF 2009 FUNDING* $60,000.00 2009		$0.00	$60,000.00	$0.00	$60,000.00	$0.00
Tulsa Community Foundation 7010 South Yale Suite 110 Tulsa, OK 74136 *2009 PASS Contribution* $2,500.00 2009		$0.00	$2,500.00	$0.00	$2,500.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
Twin Hills School 7225 Twin Hills Road Okmulgee, Oklahoma 74447 *File cabinets 1262.30* *Cash contribution 5000.00* *SUPPORT AFTER FIRE* $6,262.30 2009		$0.00	$6,262.30	$0.00	$6,262.30	$0.00
UNIVERSITY OF CALIF--HASTINGS SCHOOL OF LAW *BCJ 2009 DISCRETIONARY* $10,000.00 2009		$0.00	$10,000.00	$0.00	$10,000.00	$0.00
University of Central Oklahoma 100 North University Capmus Box 107 Edmond, OK 73034 *SPRING SEMESTER BLAKE MIDDLETON* *LAST SEMESTER* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00
UTAH FOOD BANK *JILL JOHNSON DISCRETIONARY* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00

Fiscal Year 2009

Recipient and/or Purpose	Tax Status	Beginning Balance 2009	Newly Allocated 2009	Amended 2009	Amount Paid 2009	Ending Balance 2009
VITAE SOCIETY Box 791 Box 791 Jefferson City, Missouri 65102-0791 *JS DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
WINGS WORLD WIDE *LEO SANT DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
WINGS WORLD WIDE *LEO SANT DISCRETIONARY* $1,000.00 2009		$0.00	$1,000.00	$0.00	$1,000.00	$0.00
WINGS WORLD WIDE *MVS DISCRETIONARY* $2,000.00 2009		$0.00	$2,000.00	$0.00	$2,000.00	$0.00
Woody Guthrie Coalition, Inc. Box 661 Okemah, Oklahoma 74859 *2009 Childrens Festival* $5,000.00 2009		$0.00	$5,000.00	$0.00	$5,000.00	$0.00
YWCA of Tulsa *CAPITAL CAMPAIGN 3 YEAR PLEDGE* $75,000.00 2007		$25,000.00	$0.00	$0.00	$25,000.00	$0.00
Grand Totals (82 items)		$150,000.00	$656,866.16	$500.00	$757,366.16	$50,000 00