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Form **990-PF**

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

OMB No 1545-0052

2009

			the Treasury the Service ar year 2009, or that apply. Name of foundation	or	Section	Treated a)(1) None as a Priva	xempt Cna te Foundat	tion	e i	rust		2009	
	Departm Internal I	ent of t Revenu	the Treasury ie Service	Note. The fo	oundation r	nay be able to u	use a copy of th	is return to satisfy	state rep	ortın	ng requirements			
₩	For ca	lenda	ar year 2009, or	tax year beginn				, and ending			,			
5,9	G Ch	eck a	ill that apply.	Initial return	∐ Init	ial Return o	_ `	oublic charity	_		l	Fin	al return	
A				Amended re	urn		Address	change	Nam	_	hange		 	
·	Use	the	Name of foundation							A	Employer identifie		mber	
<u>×</u>	IRS label. CRAWLEY FAMILY FOUNDATIO						reet address)	Room/suite		73-1463271 B Telephone number (see the instructions)				
MAY A	print or type. 105 North Hudson						,	800		_	(405) 23	-	•	
6 2000	See Sp	ecific	City or town				State	ZIP code		С			pending, check here	
26	Instruct		Oklahoma					73102			1 Foreign organizat			
3	H (type of organia			1(c)(3) exer			.		2 Foreign organizati here and attach c		ting the 85% test, check	
			rket value of all ass	nonexempt char sets at end of year		counting me		private founda	crual	Ε	If private foundat	on statu	s was terminated	
			art II, column (c), li			Other (specify		asii Acc	Juai	F	under section 507			
	► \$	3	4,958	8,205.	(Part I			n cash basıs)	,	_	under section 507	on is in a 60-month termination 507(b)(1)(B), check here		
	Part I			evenue and		(a) Reve	enue and	(b) Net inv	estmer	nt	(c) Adjusted	net	(d) Disbursements	
		E	. xpenses (Th olumns (b), (c),	e total of amoun and (d) may no	ts in ' neces-		per books	incor			income		for charitable	
		S	arily equal the a	amounts ın colun	nn (a)								purposes (cash basis only)	
~		(:	See the instruct	<i>IONS).)</i> s, grants, etc, received	(att sch)	6	70,000.							
2010		2		foundn is not req to a			.,							
8		3	Interest on sa	avings and tempo	rary		5,915.		5,91	5		_		
₩ ₩		4		erns terest from securities			33,064.		$\frac{3,91}{3,06}$					
			a Gross rents											
MAY	_		b Net rental income or (loss)			ļ	02 070						•	
	R E		Gross sales price	m sale of assets not o for all	n line 10 , 381 .	-1	23,278.						•	
	V E	7	assets on line 6a Capital pain net in	scome (from Part IV, I						0.				
\$	N	8	Net short-terr	n capital gain	-,									
SCANNED	Ü	9	Income modif	fications										
8		'0	a Gross sales less returns and allowances											
			b Less Cost of goods sold											
		1	c Gross profit/(los											
		11	Other income	(attach schedule	:)									
		12	Total Add lines 1 through 11		5	85,701.	. 38,979		9.					
•		13	Compensation	alaries and wages	ees, etc									
		14	Other employee's	alaries and wages	ان.									
		15	Peasipn plans	s, employee bend Ischledule) 2010 (attach sch) L-161						-				
	A D M	'	b Accounting fees (attach sch) L-161	Stant		629.		4	2.				
	. N		c Other profilees ca	attach sch) L-164	Ktmt		34,434.	3	4,43	_				
	O ! P S T	17		DEN, UT	Ä									
	KR	18 19	Taxes (attach schedule) Depreciation											
	A A	'3	sch) and depl						_					
	Ņ V G E	20	Occupancy				212			4				
		21 22	Printing and p	rences, and meet oublications	ings		213.			4.				
	A E X D P	23	Other expens	es (attach sched	ule)				-					
	Ņ	١.,	See Line 23 S				495.		3	3.			_	
	Ĕ	24	otal operation expenses. Ad	ng and administr Id lines 13 throug	ative h 23		35,771.	3	4,52	3.				
	J		Contributions, gif	ts, grants paid			60,500.		, - -				560,500.	
		26	Total expense Add lines 24	es and disburser	nents.		96,271.	,	4,52	ړ			560,500.	
-		27		26 from line 12:		- 3	JU, Z/1.	3	7, JZ	۲.			300,300.	
			a Excess of rev	enue over exper	ises		10 670							
			and disburse Net investment in	ments come (if negative, ente	er -0-)		10,570.		4,45	6				
				me (if negative, enter	·				-, 15	<u>.</u>				

Page 2

Par		Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	f year
ran		Column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash — non-interest-bearing			
	2	Savings and temporary cash investments	541,030.	283,447.	283,447.
	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 the instructions)			
_	7	Other notes and loans receivable (attach sch)			
A		Less. allowance for doubtful accounts ▶			
š	8	Inventories for sale or use			
A S E T	9	Prepaid expenses and deferred charges			
Ś	10	Investments – U.S. and state government obligations (attach schedule)			
		b Investments — corporate stock (attach schedule) L-10b Stmt	1,583,838.	1,393,054.	1,399,818.
		c Investments — corporate bonds (attach schedule) L-10c Stmt	0.	295,206.	297,284.
	11	Investments — land, buildings, and equipment: basis .			
		Less: accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule) L-13 Stmt	3,081,943.	3,224,534.	2,977,656.
	14	Land, buildings, and equipment basis ►			
		Less. accumulated depreciation (attach schedule)			
		Other assets (describe)			
	16	Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)	5,206,811.	5,196,241.	4,958,205.
L	17		3,200,011.	3/130/241.	4/330/203.
Ĭ	18	· · · · · · · · · · · · · · · · · · ·			
A B	19	· ·		==:::=::	
L	20	Loans from officers, directors, trustees, & other disqualified persons			
ī	21	Mortgages and other notes payable (attach schedule)			
Ĭ	22	· ⁻ · ⁻ · · · · · · · · · · · · · · · · · · ·			
Ė		·			
<u>S</u>	23	Total liabilities (add lines 17 through 22)			
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
N F E U T N	24	Unrestricted			
Ŧй	25	Temporarily restricted	,		
D	26				
A B A L A		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
EL	27	Capital stock, trust principal, or current funds	5,206,811.	5,196,241.	
SN	28	Paid-in or capital surplus, or land, building, and equipment fund			
o E	29	Retained earnings, accumulated income, endowment, or other funds			
RS	30	Total net assets or fund balances (see the instructions)	5,206,811.	5,196,241.	
	31	Total liabilities and net assets/fund balances (see the instructions)	5,206,811.	5,196,241.	
Part		Analysis of Changes in Net Assets or Fund Balance	es		
1	Tota end-	I net assets or fund balances at beginning of year – Part II, colur of-year figure reported on prior year's return)	mn (a), line 30 (must aç	gree with	5,206,811.
2		r amount from Part I, line 27a		. 2	-10,570.
3		increases not included in line 2 (itemize)		3	
4		lines 1, 2, and 3		4	5,196,241.
5	Decre	ases not included in line 2 (itemize)		5	
6	Tota	I net assets or fund balances at end of year (line 4 minus line 5)	- Part II, column (b), II	ne 30 6	5,196,241.

Page 3

rai	(a) List and describe	the kind(s) of property sold (e.g., rose, or common stock, 200 shares ML	eal estate,	(b) How acque P — Purcha D — Donat	ase	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
	See Schedule 3 (sho	rt-term)		P	-	Various	Various
	See Schedule 3 (lon			<u>-</u> P		Various	Various
	Litigation settleme	<u>-</u> P	-	Various	Various		
<u>d</u>		110 (20119 002)					
<u>e</u>							_
<u>`</u>	(e) Gross sales price	e e	(h) Gain or (loss) (e) plus (f) minus (g)				
a	216,335.	0.	297	7,943.			-81,608.
<u>=</u> b		0.		3,371.			-42,324.
		0.		0.			654.
d							
е							
		ng gain in column (h) and owned by	the foundation on 12/31/69			(I) Gains (Coli	ımn (h)
	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if ar			gain minus column (F an -0-) or Losses (fr), but not less
a							-81,608.
b							-42,324.
с	0.	0.		0.			654.
d							·
е							
	Net short-term capital gain or (li If gain, also enter in Part I, line	capital loss) — If gain, also If (loss), endoss) as defined in sections 1222(5) at 8, column (c) (see the instructions)	\neg		2		-123,278.
Par	ın Part I, line 8	Section 4940(e) for Reduced			3		
Was If 'Ye	s,' the foundation does not quali	is part blank. Ion 4942 tax on the distributable among the section 4940(e) Do not continue to the column for each year; see the	nplete this part		<u> </u>	Yes	X No
	(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use ass			(d) Distribution umn (b) divided	ı ratıo by column (c))
	2008	537,333.	4,609	9,789.		_	0.116563
	2007	525,202.		6,233.			0.129800
	2006	436,797.		7,175.			0.152717
	2005	367,847.		3,977.			0.207943
	2004	132,448.		0,802.			0.114100
2	Total of line 1, column (d)				2		0.721123
3	Average distribution ratio for the number of years the foundation	e 5-year base period – divide the tot has been in existence if less than 5	al on line 2 by 5, or by the years		3		0.144225
4	Enter the net value of noncharit	able-use assets for 2009 from Part)	K, line 5	-	4		1,312,723.
5	Multiply line 4 by line 3			_	5		622,002.
6	Enter 1% of net investment inco	ome (1% of Part I, line 27b)		-	6		45.
7	Add lines 5 and 6			-	7		622,047.
8	Enter qualifying distributions fro	·			8		560,500.
	If line 8 is equal to or greater the Part VI instructions.	an line 7, check the box in Part VI, I	ine 1b, and complete that pa	art using a	1%	tax rate See the	:

Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names BAA

(or designate) of each state as required by General Instruction G? If 'No,' attach explanation

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Form 990-PF (2009)

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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

a	t 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		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► <u>N/A</u>			
14	The books are in care of ► James B Crawley Telephone no. ► (405)	232	-970	00
	Located at ► 105 North Hudson, Suite 800, Oklahoma City OK ZIP + 4 ► 73102		-	
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			
Pai	t 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
1	a 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 X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			
	disqualified person? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? Yes X 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 X 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 the instructions)?	1 b		
	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		Х
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? If 'Yes,' list the years ▶ 20 , 20 , 20 , 20			
	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 the instructions)	2b		<u> </u>
	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 20 , 20 , 20 , 20			
3	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes X 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		
4	a 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
3A/	Fc	rm 9 9	0-PF	(2009)

Amount

Total. Add lines 1 through 3

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Form 990-PF (2009)

Par	X Minimum Investment Return (All domestic foundations must complete this part. Fo see instructions.)	reign	foundations,
1 a	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes Average monthly fair market value of securities	1a	3,952,061.
Ŀ	Average of monthly cash balances	1 b	426,338.
c	Fair market value of all other assets (see instructions)	1 c	 _
c	Total (add lines 1a, b, and c)	1 d	4,378,399.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c		
	(attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d	3	4,378,399.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	65,676.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,312,723.
_6	Minimum investment return. Enter 5% of line 5	6	<u>21</u> 5,636.
Par	TXI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating and certain foreign organizations check here ► and do not complete this pa		oundations
1	Minimum investment return from Part X, line 6	1	215,636.
2 a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009. (This does not include the tax from Part VI.)		
c	Add lines 2a and 2b	2c	89.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	215,547.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	215,547.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	215,547.
Par	t XII Qualifying Distributions (see Instructions)	<u> </u>	
1 a	Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1a	560,500.
b	Program-related investments – total from Part IX-B.	1 b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3 a	Amounts set aside for specific charitable projects that satisfy the Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	560,500.
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 instructions)	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	560,500.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whet qualifies for the section 4940(e) reduction of tax in those years.	her the	foundation
BAA			Form 990-PF (2009)

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,				215,547.
	come, if any, as of the end of 2009				213,347.
	nt for 2008 only			0.	
b Total for prior y	ears: 20, 20, 20				
	ions carryover, if any, to 2009.				
a From 2004	80,512.				
b From 2005	279,704.				
c From 2006	294,674.				
d From 2007	326,986.				
e From 2008	307,014.	1 000 000			
f Total of lines	•	1,288,890.			
	stributions for 2009 from Part 560,500.				
	008, but not more than line 2a				
• •					
	ndistributed income of prior years juired — see instructions)				
	istributions out of corpus juired — see instructions)				
d Applied to 20	009 distributable amount				215,547.
_	mount distributed out of corpus	344,953.			
	ions carryover applied to 2009 nt appears in column (d), the				
	nt appears in column (d), the nt must be shown in column (a))				
	t total of each column as				
indicated be	es 3f, 4c, and 4e. Subtract line 5	1,633,843.			
		1,033,043.			
b Prior years' i line 4b from	undistributed income Subtract line 2b		0.		
c Enter the an	nount of prior years' undistribut-	,			
	or which a notice of deficiency ued, or on which the section				
	nas been previously assessed				
d Subtract line	6c from line 6b Taxable				
	ee instructions		0.	_	
e Undistributed in	come for 2008 Subtract line 4a from				
line 2a Taxable	amount — see instructions			0.	
f Undistributed	I income for 2009 Subtract lines				
4d and 5 from	m line 1. This amount must be				0
distributed in					0.
	ated as distributions out of tisfy requirements imposed				
by section 17 (see instruct	70(b)(1)(F) or 4942(g)(3)				
	•				
8 Excess distri	butions carryover from 2004 not ne 5 or line 7 (see instructions)	80,512.			
		30,0221			· · · · · · · · · · · · · · · · · · ·
Subtract line	ibutions carryover to 2010. s 7 and 8 from line 6a	1,553,331.			
10 Analysis of li	ne 9	,			
a Excess from	2005 279,704.				
b Excess from	2006 294,674.				
c Excess from					
d Excess from					
e Excess from	2009 344,953.				5 000 BE (0000)

Form 990-PF (2009) CRAWLEY FAMILY F		 		73-146327	
Part XIV Private Operating Foundation					N/A
1a If the foundation has received a ruling or is effective for 2009, enter the date of the	determination letter ruling	that it is a private	operating foundation	n, and the ruling	
b Check box to indicate whether the founda	tion is a private ope	erating foundation	described in section	4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum investment return from Part X for	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
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					
 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		<u> </u>			
c 'Support' alternative test — enter:					
 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()(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	organization ha	d \$5,000 or mor	e in
assets at any time during the 1 Information Regarding Foundation Management		structions.)			·
a List any managers of the foundation who close of any tax year (but only if they have James B Crawley	have contributed m	ore than 2% of the than \$5,000) (See	total contributions re e section 507(d)(2))	eceived by the found	dation before the
-					
b List any managers of the foundation who a partnership or other entity) of which the None	own 10% or more of foundation has a 1	of the stock of a cor 0% or greater inter	rporation (or an equarest.	ally large portion of	the ownership of
None					
2 Information Regarding Contribution, Gran Check here X if the foundation only r requests for funds. If the foundation make complete items 2a, b, c, and d	nakes contributions	to preselected cha	aritable organizations	s and does not acce anizations under oth	pt unsolicited er conditions,
a The name, address, and telephone number	er of the person to v	whom applications	should be addressed	I	
b The form in which applications should be	submitted and infor	mation and materia	als they should inclu	de	
c Any submission deadlines					
d Any restrictions or limitations on awards,	such as by geograp	hıcal areas, charıta	able fields, kinds of i	nstitutions, or other	factors:
BAA		EA0310 07/00/00			orm 990-PF (2009)
	I E	EA0310 07/06/09		Г	UIIII JJU- FF (4003)

3 Grants and Contributions Paid During the Ye	ar or Approved for Fut	ure Paymen	nt	
Recipient		Foundation status of recipient		Amount
Name and address (home or business)	substantial contributor	recipient	00////00////	
a Paid during the year				
See Schedule 4				
				560,500.
				ĺ
Total	<u> </u>	<u> </u>	<u> </u>	560,500.
b Approved for future payment		1		360,300.
b Approved for fatare payment				
Total			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated	business income	Excluded by	section 512, 513, or 514	
1 Program service revenue	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see the instructions)
a			1		
b					
c					
d		···			
e					
f					
g Fees and contracts from government agencies		= .			
2 Membership dues and assessments			1		
3 Interest on savings and temporary cash investments			14	5,915.	
4 Dividends and interest from securities			14	33,064.	· · · · · · · · · · · · · · · · · · ·
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	-123,932.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
С					
d					
e					
Subtotal Add columns (b), (d), and (e)				-84,953.	
13 Total. Add line 12, columns (b), (d), and (e)			•	13	-84,953.
See worksheet in the instructions for line 13 to verify ca	alculations)			·	

art XVI	B Relationship of Activities to the Accomplishment of Exempt Purposes
ine 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 the instructions)
	None

Forr	n 990-F	F (2009) CRAWLE	Y FAMILY	FOUND	ATION					73-1	463271		Page 1 3
Pai	t XVII	Information Ro Exempt Organ	egarding T	ransfers	To and T	ransactio	ons an	d Relations	hips Wit	th No	oncharital	ole	
											1	Ye	s No
1	Did the descr	ie organization directly ibed in section 501(c) (or indirectly of of the Code (c	engage in other than	any of the fo section 501	ollowing wit c)(3) organ	th any c nizations	other organizati s) or in section	on 527.				
	relatir	ng to political organizat	tions?			, o, (o, o, g.,.		-, -, -, -, -, -, -, -, -, -, -, -, -, -	U				1
		fers from the reporting	foundation to	a nonch	arıtable exem	pt organiza	ation of						-
	(1) C										1a(X
	` '	ther assets						•			1a (2)	_ X
		transactions:											
		ales of assets to a non				• •					1b(+ X
	` '	urchases of assets from			npt organizati	on	•				1b(X
		ental of facilities, equip eimbursement arrange		er assers							1b(1b(X
		oans or loan guarantee									1b($\frac{\Lambda}{X}$
		erformance of services		nn or fund	draising solici	itations					1b($\frac{\lambda}{x}$
	• •	ng of facilities, equipme		•	•		ees				1c	-/ -	X
		. , .		,		, ,							• -
•	d If the the go any tr	answer to any of the a pods, other assets, or s ansaction or sharing a	ibove is 'Yes,' services given rrangement, s	complete by the re show in co	the following porting found the blumn (d) the	g schedule dation If th value of th	. Colum le found le good	in (b) should al lation received s, other assets	ways shov less than , or service	v the fair mes	fair market v narket value ceived	/alue o in	f
	Line no	(b) Amount involved			able exempt orga		i e) Description of tra					
		· · · · · · · · · · · · · · · · · · ·											
													
	-	-									. —		
				.							- 		
											•		
		*				 -							
													•
									•				
	descri	foundation directly or bed in section 501(c) of	of the Code (o	ated with other than	, or related to section 501(o, one or m c)(3)) or in	ore tax section	-exempt organ 1 527?	ızatıons			′es 🏻	No
	<u>ا بد</u>	s,' complete the followi (a) Name of organizati			(b) Type of or	rganization			'c) Descrin	tion c	of relationsh	n	
		(L) riairio or organizati			(2) .)po o. o.	gamzanon		† · · · · · · ·		4,011 0	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Р	
		1											
				İ									
								<u> </u>					
U	nder pena omplete D	Ities of perjury, I declare that I Declaration of preparer (other t	have examined th	nis return, ind	cluding accompan	ying schedules	and state	ements, and to the b	est of my kno	wledge	and belief, it is	true, con	ect, and
				\bigcap	isou on an imorni		рторолог .	indication in the state of the					
s	\sim	Mana 13	(), a,	علا.	_		4	5-6-10	▶ Pre	sid	ent		
1	Signa	tuje of officer or trustee		~	<i>></i>		Date	, , ,	Title	u		_	
G N		-	•				Date	e	QL		Preparer's Ider	tifying ni	mber
H P	aid	Preparer's signature	Q91	(1)	ma c		٦٥	/04/10	Check if self-		(See Signature	in the in	strs)
	re- arer's	Firm's name (or Wagge	oner Acco	unt i	Service	es I.I.C	103	, 04/IO	employed EIN ►	للسلت	L		
Ų	se	vours if self-			Suite 3		-		Fux				
C	Only employed), address, and Over 105 North Hudson, Suite 310										77		

(405) 232-1577

Form **990-PF** (2009)

Phone no

73102-4815

OK

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

BAA

OKLAHOMA CITY

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, 990-EZ, or 990-PF

OMB No 1545-0047

2009

Name of the organization		Employer identification number
CRAWLEY FAMILY FOUNDATION		73-1463271
Organization type (check one):	· 	
Filers of:	Section:	
Form 990 or 990-EZ	501(c)() (enter number) organization 4947(a)(1) nonexempt charitable trust not 527 political organization	
Form 990-PF	X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust trea 501(c)(3) taxable private foundation	ted as a private foundation
Check if your organization is covered by the G Note: Only a section 501(c)(7), (8), or (10) org	General Rule or a Special Rule. ganization can check boxes for both the General	Rule and a Special Rule. See instructions
General Rule —		
	Z, or 990-PF that received, during the year, \$5,0	000 or more (in money or property) from any one
Special Rules —		
509(a)(1)/170(b)(1)(A)(vi) and received fro	Form 990 or 990-EZ, that met the 33-1/3% supporting any one contributor, during the year, a contributor (ii) Form 990-EZ, line 1 Complete Parts I and	oution of the greater of (1) \$5,000 or (2) 2% of the
For a section 501(c)(7), (8), or (10) organiaggregate contributions of more than \$1,0 prevention of cruelty to children or animals	zation filing Form 990 or 990-EZ, that received fr 00 for use <i>exclusively</i> for religious, charitable, so s Complete Parts I, II, and III.	om any one contributor, during the year, cientific, literary, or educational purposes, or the
this box is checked, enter here the total co	zation filing Form 990 or 990-EZ, that received from us, charitable, etc., purposes, but these contributed that were received during the year for unless the General Rule applies to this organization.	or an <i>exclusively</i> religious, charitable, etc,
religious, charitable, etc, contributions of	5,000 or more during the year	> \$
990-PF) but it must answer 'No' on Part IV. III	by the General Rule and/or the Special Rules doe ne 2 of their Form 990, or check the box on line l ng requirements of Schedule B (Form 990, 990-E	H of its Form 990 EZ, or on line 2 of its Form
BAA For Privacy Act and Paperwork Reduct for Form 990, 990EZ, or 990-PF.	ion Act Notice, see the Instructions	Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)	Page 1
Name of organization	Employer identific

of 1 ation number of Part I 73-1463271 CRAWLEY FAMILY FOUNDATION

Part I	Contributors (see instructions)		
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Crawley Petroleum Corporation 105 North Hudson, Suite 800 Oklahoma City OK 73102	\$500,000.	Person X Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b)	(c) Aggregate contributions	(d) Type of contribution
2	JBC Investment Company, A Limited Partnership 105 North Hudson, Suite 800 Oklahoma City OK 73102	\$100,000.	Person X Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
	Mary W Crawley 105 North Hudson, Suite 800 Oklahoma City OK 73102	\$70,000.	Person X Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
Number	Name, address, and ZIP + 4	Aggregate contributions	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
	Name, address, and ZIP + 4	Aggregate contributions	Person Payroll Noncash (Complete Part II if there
Number (a)	Name, address, and ZIP + 4	Aggregate contributions	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
Number (a)	Name, address, and ZIP + 4	Aggregate contributions	Person Payroll Noncash (Complete Part II if there is a noncash contribution) (d) Type of contribution Person Payroll Noncash (Complete Part II if there
(a) Number	Name, address, and ZIP + 4 (b) Name, address, and ZIP + 4 (b)	Aggregate contributions \$ (c) Aggregate contributions \$ (c) Aggregate contributions \$ (c) Aggregate contributions	Person Payroll Noncash (Complete Part II if there is a noncash contribution) (d) Type of contribution Person Payroll Noncash (Complete Part II if there is a noncash contribution)

Form 990-PF, Page 1, Part I, Line 23

• .	~~	~ .
ıne	ンマ	Stmt

Other expenses:	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
Membership fees -				
Assoc of Small Foundations	495.	33.		l

Total

495. 33.

Form 990-PF, Page 1, Part I

Line 16b - Accounting Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Waggoner Accounting	Bookkeeping, tax retur	629.	42.		

Total

629. 42.

Form 990-PF, Page 1, Part I

Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
First Western Trust	Portfoliomanagement	34,434.	34,434.		

Total

34,434. 34,434.

Form 990-PF, Page 2, Part II, Line 10b

L-10b Stmt

	End o	f Year	
Line 10b - Investments - Corporate Stock:	Book Value	Fair Market Value	
See Schedule 1	1,393,054.	1,399,818.	
Total	1,393,054.	1,399,818.	

Form 990-PF, Page 2, Part II, Line 10c

L- 10c Stmt

	End of Year			
Line 10c - Investments - Corporate Bonds:	Book Value	Fair Market Value		
See Schedule 2	295,206.	297,284.		
Total	295,206.	297,284.		

Form 990-PF, Page 2, Part II, Line 13 L-13 Stmt

	End o	f Year	
Line 13 - Investments - Other:	Book Value	Fair Market Value	
838,420.20 shares Aetos Capital LLC	816,244.	838,420.	
7,416.67 shares Buffal Mid Cap Fund	63,635.	100,867.	
10,534.32 shares Harbor Small Cap Value Fund	210,743.	172,131.	
5,400.26 shares JP Morgan Mid Cap Growth Fund	63,635.	98,933.	
16,588.66 shares Thornburg Int'l Value Fund	489,725.	420,854.	
96,312.643 shares Victory Diversified Stock Fund	1,580,552.	1,346,451.	
Total	3,224,534.	2,977,656.	

CRAWLEY FAMILY FOUNDATION #73-1463271

Schedule 1

Supporting Schedule to Form 990-PF, Part II, Line 10b - Investments - Corporate Stock 2009

			End of Year	
			Book	Fair Mkt
			Value	Value
721	shs	ABBOTT LABORATORIES	33,369	38,927
1,195	shs	AMERICAN TOWER CORP	49,886	51,636
1,412	shs	AVON PRODS INC	44,950	44,478
335	shs	BAXTER INTERNATIONAL INC	18,884	19,658
11	shs	BERKSHIRE HATHAWAY INC	42,617	36,146
240	shs	BLACKROCK INC	40,967	55,728
1,276	shs	CAMERON INTL CORP	48,033	53,337
712	shs	CELGENE CORP	36,718	39,644
426	shs	CHEVRON CORPORATION	31,616	32,798
1,999	shs	CISCO SYS INC	51,888	47,856
447	shs	COOPER INDUSTRIES PLC NEW IRELAND COM	19,272	19,060
652	shs	DANAHER CORP	49,058	49,030
1,022	shs	ECOLAB INC	46,127	45,561
1	shs	ENBRIDGE ENERGY MGMT, LLC	0	35
942	shs	GILEAD SCIENCES INC	31,571	40,760
271	shs	GOLDMAN SACHS GROUP INC	44,628	45,756
993	shs	HONEYWELL INTERNATIONAL INC	52,018	38,926
383	shs	INTL BUSINESS MACHINES CORP	47,277	50,135
845	shs	ITT INDS INC	51,116	42,030
727	shs	KOHLS CORP	40,599	39,207
1,105	shs	LAUDER ESTEE COS INC	44,680	53,438
1,616	shs	MICROSOFT CORPORATION	44,701	49,256
578	shs	NIKE INC CL B	31,914	38,188
1,914	shs	ORACLE CORP	38,567	46,950
569	shs	PEPSICO INC	28,913	34,595
328	shs	QUALCOMM INC	13,876	15,173
2,225	shs	STAPLES INC	53,776	54,713
904	shs	STATE STREET CORPORATION	53,620	39,360
901	shs	STRYKER CORP	44,037	45,383
1,733	shs	SYSCO CORP	52,142	48,420
1,769	shs	TEXAS INSTRUMTS	52,030	46,100
844	shs	THERMOS FISHER CORP	47,348	40,250
872	shs	WAL MART STORES INC	42,720	46,608
2,404	shs	WILLIAMS COMPANIES	64,136	50,676
			\$ 1,393,054	\$ 1,399,818

5/4/2010

CRAWLEY FAMILY FOUNDATION #73-1463271

Schedule 2

Supporting Schedule to Form 990-PF, Part II, Line 10c - Investments - Corporate Bonds 2009

			End of Year			•
				Book Value	F	air Mkt Value
10,000	shs	AMERICAN EXPRESS CO		10,080		10,487
10,000	shs	AMGEN INC		9,388		9,875
10,000	shs	CATERPILLAR FINAL SVCS		10,454		10,614
10,000	shs	CITIGROUP INC		10,265		10,368
10,000	shs	DEERE JOHN		10,364		10,347
10,000	shs	GENERAL ELEC		10,378		10,563
10,000	shs	GOLDMAN SACHS GROUP INC		10,923		10,938
10,000	shs	JEFFRIES GROUP INC		10,056		10,269
10,000	shs	JP MORGAN CHASE & CO		10,722		10,665
10,000	shs	LOEWS CORP		10,841		10,842
10,000	shs	MCDONALDS CORP		10,720		10,597
10,000	shs	MEDTRONIC INC		9,652		10,150
10,000	shs	METLIFE INC		10,458		10,750
10,000	shs	MORGAN STANLEY		10,544		10,595
10,000	shs	PACIFIC GAS & ELECTRIC CO		10,000		10,040
55,000	shs	REGIONS BK ALA MTN		57,115		57,073
10,000	shs	SOUTH CAROLINA ELECTRIC & GAS CO		10,727		10,511
10,000	shs	WALT DISNEY		10,731		10,658
60,000	shs	WELLS FARGO & CO		61,788		61,942
			\$	295,206	\$	297,284

CRAWLEY FAMILY FOUNDATION #73-1463271

Schedule 3
Supporting Schedule to Form 990-PF, Part IV, Lines 1a and 1b - Capital Gains and Losses for Tax on Investment Income 2009

First Western Investment Account RENEAL ELEC Research Investment Account Renearch Account Restern Investment Account Renearch Account Restern Investment Account Renearch Account Restern Investment Account Renearch Account Renearch Account Restern Investment Account Renearch Account Renearch Account Renearch Account Restern Investment Account Renearch Account Renearch Restern Investment Account Renearch Account Renearch Restern Investment Account Renearch Restern Investment Account Renearch Restern Investment Account Renearch Account Renearch Restern Investment Account Renearch Recount Renearch Restern Investment Account	Account	Security	Shares	Bought	Sold	Gross Proceeds	Cost Basis	Realized Galn/Loss
Seiten Investment MEDITRONIC INC 650 611220009 7/30/2009 7/30/2009 7/30/2009 7/30/2009 7/30/2009 7/30/2009 62/35/30 62/34/12 Seiten Investment GOLDMAN SACHS GROUP INC 100 61/12/2009 9/29/2009 10,57/6 0 10,331 20 Seiten Investment GOLDMAN SACHS GROUP INCORPORATED 100 61/12/2009 9/29/2009 10,67/6 0 10,331 20 Seiten Investment CITIGROUP INCORPORATED 100 61/12/2009 9/29/2009 10,635 40 10,331 20 Investment Account BANK OF AMERICA 52 11/10/2008 2.156,2009 1,799 48 14,386 33 Investment Account GENERAL ELEC 52 11/10/2008 2.156,2009 1,799 48 14,386 33 Investment Account GENERAL ELEC 23 4/24/2008 3/26/2009 1,789 48 1,786 33 Investment Account GENERAL ELEC 33 3/27/2008 2/24/2008 3/26/2009 1,789 48 1,786 48 Investment Account GENERAL ELEC 23	Sonds -First Western Investment	DISCOVERY FINL SVCS	150	6/11/2009	6/18/2009	14,165 62	14,137 50	28 12
Sestem Investment BANK OF AMERICA 100 6/11/2009 9/28/2009 10,570 60 10,337 5 2 Sestem Investment GOLDMAN SACHS GROUP INC 100 6/11/2009 9/29/2009 10,401 50 10,381 50 Sestem Investment COLDMAN SACHS GROUP INC 100 6/11/2009 9/30/2009 10,123 20 10,381 50 Sestem Investment Account CITICROUP INCORPORATED 100 6/11/2009 9/30/2009 10,123 20 10,085 00 Investment Account BANK OF AMERICA 627 11/10/2008 2/25/2009 1,132 20 10,085 00 Investment Account GENERAL ELEC 538 4/24/2008 2/25/2009 4/31 60 1,751 90 Investment Account GENERAL ELEC 209 4/24/2008 3/26/2009 1,686 50 1,696 50 Investment Account GENERAL ELEC 232 3/26/2009 2/117 96 8,033 84 Investment Account GENERAL ELEC 233 3/26/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 234/2008 2/24/2008 <t< td=""><td>3onds -First Western Investment</td><td>MEDTRONIC INC</td><td>650</td><td>6/12/2009</td><td>7/30/2009</td><td>63,539 38</td><td>62,741.25</td><td>798 13</td></t<>	3onds -First Western Investment	MEDTRONIC INC	650	6/12/2009	7/30/2009	63,539 38	62,741.25	798 13
Sestem Investment GOLDIAMN SACHS GROUP INC 100 6/11/2009 9/29/2009 10,401 50 10,361 50 Sestem Investment JESTED GROUP INC CHASE & CO 100 6/11/2009 9/29/2009 10,635 40 10,351 70 Sestem Investment Account BANK OF AMERICA 762 10/16/2008 2/25/2009 1,799 48 14,386 33 Investment Account BANK OF AMERICA 627 11/10/2008 2/25/2009 4,815 07 11,685 08 Investment Account GENERAL ELEC 53 4/24/2008 2/25/2009 4,815 07 11,511 90 Investment Account GENERAL ELEC 209 4/24/2008 2/25/2009 4,815 07 11,511 90 Investment Account GENERAL ELEC 23 3/27/2009 2/24/2009 3/26/2009 1,045 50 1,595 40 1,511 90 Investment Account GENERAL ELEC 33 3/27/2009 2/24/2009 3/27/2009 1,046 50 1,756 40 1,595 33 Investment Account GENERAL ELEC 33 3/27/2009 2/24/2009 3/24/2009 1,046 50<	3onds -First Western Investment	BANK OF AMERICA	100	6/11/2009	9/28/2009	10,570 60	10,375 20	195 40
Sestem Investment JP MORGAN CHASE & CO 100 6/11/2009 9/29/2009 10,635 40 10,533 170 Sestem Investment Account CITIGROUP INCORPORATED 100 6/12/2009 9/30/2009 10,123 20 10,085 00 Investment Account BANK OF AMERICA 70 11/10/2008 2/25/2009 1,799 48 14,386 30 Investment Account BANK OF AMERICA 627 11/10/2008 2/25/2009 1,799 48 14,386 30 Investment Account GENERAL ELEC 538 4/24/2008 2/25/2009 1,799 48 14,386 30 Investment Account GENERAL ELEC 20 1/1/10/2008 3/26/2009 1,799 48 14,386 30 Investment Account GENERAL ELEC 33 3/27/2006 2/24/2009 1,616 46 6,547 15 Investment Account GENERAL ELEC 33 3/27/2006 2/24/2009 1,616 46 6,547 15 Investment Account GENERAL ELEC 33 3/27/2006 2/24/2009 1,616 46 6,547 15 Investment Account GENERAL ELEC 33	3onds -First Western Investment	GOLDMAN SACHS GROUP INC	100	6/11/2009	9/29/2009	10,401 50	10,361 50	40 00
estement Account Restment Account	3onds -First Western Investment	JP MORGAN CHASE & CO	100	6/11/2009	9/29/2009	10,635 40	10,531 70	103 70
PARTICAL PLANERICA Account Investment Account A	3onds -First Western Investment	CITIGROUP INCORPORATED	100	6/12/2009	9/30/2009	10,123 20	10,085 00	38 20
Investment Account BANK OF AMERICA 627 11/10/2008 2/25/2009 1,799 48 14,386 33 Investment Account GENERAL ELEC 538 4/24/2008 2/25/2009 4,815 07 17,511 90 Investment Account GENENTECH INC 209 4/24/2008 2/25/2009 68,242 60 16,863 08 Investment Account GENENTECH INC 203 4/24/2008 3/26/2009 10,796 64 Investment Account GENERAL ELEC 332 8/16/2006 2/24/2009 10,796 64 Investment Account GENERAL ELEC 332 8/16/2006 2/24/2009 3,017 86 10,796 64 Investment Account GENERAL ELEC 332 8/16/2006 2/24/2009 3,017 86 10,796 64 Investment Account GENERAL ELEC 332 8/16/2006 2/24/2009 1,681 64 7,467 29 Investment Account GENERAL ELEC 21 4/19/2007 2/24/2009 1,681 64 7,467 29 Investment Account GENERAL ELEC 21 4/19/2007 2/26/2009 1,681 64	inst Western Investment Account	BANK OF AMERICA	762	10/16/2008	2/25/2009	2,186 93	15,923 67	(13,736 74)
rivestment Account GENERAL ELEC 538 4/24/2008 2/25/2009 4,815 07 17,511 90 nivestment Account GENENTECH INC 209 4/24/2008 3/26/2009 4,815 07 17,511 90 nivestment Account GENENTECH INC 209 4/24/2008 3/26/2009 15,025 74 nivestment Account GENERAL ELEC 323 3/27/2006 2/24/2009 3,017 86 10,796 64 nivestment Account GENERAL ELEC 332 4/19/2007 2/24/2009 1,681 64 6,547 15 nivestment Account GENERAL ELEC 33 4/19/2007 2/26/2009 1,681 64 6,547 15 nivestment Account GENERAL ELEC 33 3/17/2006 3/26/2009 1,888 44 7,467 29 nivestment Account GENERAL ELEC 103 3/27/2006 3/26/2009 1,888 44 7,467 29 nivestment Account GENERAL ELEC 21 4/19/2007 2/25/2009 1,045 00 9/105 50 nivestment Account GENERAL ELEC 21 4/19/2007 2/26/2009 <t< td=""><td>First Western Investment Account</td><td>BANK OF AMERICA</td><td>627</td><td>11/10/2008</td><td>2/25/2009</td><td>1,799 48</td><td>14,386 33</td><td>(12,586 85)</td></t<>	First Western Investment Account	BANK OF AMERICA	627	11/10/2008	2/25/2009	1,799 48	14,386 33	(12,586 85)
Procestment Account restment Account Result Account CENERAL ELEC TRISAP MIDCAP 400 GROWTH 1,379 00 7/17/2008 2/24/2009 1,885 00 15,025 74 7/17/2008 2/24/2009 1,885 00 15,025 74 1/16,863 08 0.8 16,85 00 15,025 74 Investment Account GENERAL ELEC Threstment Account Result Account Account GENERAL ELEC Threstment Account COMCAST CORP CLA Threstment Account COMCAST	First Western Investment Account	GENERAL ELEC	538	4/24/2008	2/25/2009	4,815 07	17,511 90	(12,696 83)
Investment Account GENERAL ELEC 233 3/27/2006 2/24/2009 19,855 00 15,025 74 Investment Account GENERAL ELEC 233 3/27/2006 2/24/2009 2,117 96 8,033 84 Investment Account GENERAL ELEC 185 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 185 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 185 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 185 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 185 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 10 11 11/13/2006 3/26/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 11 11/13/2006 3/26/2009 1,685 00 16,876 71 Investment Account KOHLS CORP 1 1,11/12/2	First Western Investment Account	MIDCAP 400	1,379 00	7/17/2008	2/25/2009	68,242 60	116,863 08	(48,620 48)
rivestment Account Acco	First Western Investment Account	GENENTECH INC	209	4/24/2008	3/26/2009	19,855 00	15,025 74	4,829 26
Investment Account GENERAL ELEC 233 3/27/2006 2/24/2009 2,117 96 8,033 84 Investment Account GENERAL ELEC 332 8/16/2006 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 185 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 211 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 211 4/19/2007 2/26/2009 1,681 64 7,467 29 Investment Account GENENTECH INC 103 3/27/2006 3/26/2009 9,785 00 9,025 89 Investment Account GENENTECH INC 11/13/2006 3/26/2009 1,045 00 12,209 12 Investment Account GENENTECH INC 11/13/2006 3/26/2009 1,045 00 10,97 08 Investment Account KOHLS CORP 277 11/13/2006 11/18/2009 14,732 72 13,746 88 Investment Account COMCAST CORP CL A 478 4/24/2008 12/21/2009 19	SHORT TERM					216,334.78	297,942.87	(81,608.09)
Investment Account GENERAL ELEC 233 3/27/2006 2/24/2009 2,117 96 6,033 84 Investment Account GENERAL ELEC 332 8/16/2006 2/24/2009 3,017 86 10,796 64 Investment Account GENERAL ELEC 185 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 211 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 211 4/19/2007 2/24/2009 1,888 44 7,467 29 Investment Account GENENTECH INC 103 3/26/2009 1,687 00 12,209 12 Investment Account GENENTECH INC 11/13/2006 3/26/2009 1,648 00 16,876 71 Investment Account GENENTECH INC 207 4/19/2007 3/26/2009 1,646 80 1,737 72 13,746 88 Investment Account KOHLS CORP 26 3/26/2009 14,732 72 13,746 88 1,732 72 1,742 88 1,732 72 1,746 88 Investment Account COMCAST CORP CL A	ERM							
Investment Account GENERAL ELEC 332 8/16/2006 2/24/2009 3,017 86 10,796 64 Investment Account GENERAL ELEC 185 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 211 4/19/2007 2/25/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 103 3/27/2006 3/26/2009 9,785 00 9,025 89 Investment Account GENENTECH INC 154 8/16/2006 3/26/2009 14,630 00 12,209 12 Investment Account GENENTECH INC 207 4/19/2007 3/26/2009 16,876 71 Investment Account KOHLS CORP 27 11/11/2004 11/18/2009 4,264 74 3,941 63 Investment Account KOHLS CORP 1,938 00 7/3/2006 12/9/2009 30,498 75 54,102 57 Investment Account COMCAST CORP CL A 478 4/24/2008 12/9/2009 197 09 9,703 40 Investment Account UNITEDHEALTH GROUP INC 4/24/2008 12/9/2009 <td< td=""><td>irst Western Investment Account</td><td>GENERAL ELEC</td><td>233</td><td>3/27/2006</td><td>2/24/2009</td><td>2,117 96</td><td>8,033 84</td><td>(5,915 88)</td></td<>	irst Western Investment Account	GENERAL ELEC	233	3/27/2006	2/24/2009	2,117 96	8,033 84	(5,915 88)
Investment Account GENERAL ELEC 185 4/19/2007 2/24/2009 1,681 64 6,547 15 Investment Account GENERAL ELEC 211 4/19/2007 2/25/2009 1,888 44 7,467 29 Investment Account GENENTECH INC 103 3/27/2006 3/26/2009 9,785 00 9,025 89 Investment Account GENENTECH INC 11 11/13/2006 3/26/2009 1,045 00 12,209 12 Investment Account GENENTECH INC 207 4/19/2007 3/26/2009 1,045 00 919 71 Investment Account GENENTECH INC 207 4/19/2007 3/26/2009 1,045 00 16,876 71 Investment Account KOHLS CORP 77 11/11/2004 11/18/2009 4,264 74 3,941 63 Investment Account COMCAST CORP CL A 1,938 00 7/3/2007 12/9/2009 7,522 39 9,703 40 Investment Account UNITEDHEALTH GROUP INC 4/24/2008 12/9/2009 197 09 000 Investment Account UNITEDHEALTH GROUP INC 4/24/2008 12/9/2009	First Western Investment Account	GENERAL ELEC	332	8/16/2006	2/24/2009	3,017 86	10,796 64	(7,778 78)
Investment Account GENERAL ELEC 211 4/19/2007 2/25/2009 1,888 44 7,467 29 Investment Account GENENTECH INC 103 3/27/2006 3/26/2009 1,685 00 9,785 00 9,025 89 Investment Account GENENTECH INC 11 11/13/2006 3/26/2009 1,045 00 12,209 12 Investment Account GENENTECH INC 207 4/19/2007 3/26/2009 1,045 00 16,876 71 Investment Account KOHLS CORP 77 11/11/2004 11/18/2009 4,264 74 3,941 63 Investment Account KOHLS CORP 266 3/27/2006 11/18/2009 14,732 72 13,746 88 Investment Account COMCAST CORP CL A 1,938 00 7/3/2007 12/9/2009 30,498 75 54,102 57 Investment Account COMCAST CORP CL A 478 4/24/2008 12/21/2009 197 09 0 00 Investment Account UNITEDHEALTH GROUP INC 478 4/24/2008 12/21/2009 197 09 0 00 Investment Account Account Account	First Western Investment Account	GENERAL ELEC	185	4/19/2007	2/24/2009	1,681 64	6,547 15	(4,865 51)
Investment Account GENENTECH INC 103 3/27/2006 3/26/2009 9,785 00 9,025 89 Investment Account GENENTECH INC 154 8/16/2006 3/26/2009 1,045 00 12,209 12 Investment Account GENENTECH INC 11 11/13/2006 3/26/2009 1,045 00 919 71 Investment Account GENENTECH INC 207 4/19/2007 3/26/2009 19,665 00 16,876 71 Investment Account KOHLS CORP 77 11/11/2004 11/18/2009 4,264 74 3,941 63 Investment Account KOHLS CORP 1,938 00 7/3/2007 12/9/2009 14,732 72 13,746 88 Investment Account COMCAST CORP CL A 4,732 70 12/9/2009 7,522 39 9,703 40 Investment Account COMCAST CORP CL A 478 4/24/2008 12/9/2009 7,522 39 9,703 40 Investment Account UNITEDHEALTH GROUP INC 478 4/24/2008 12/21/2009 197 09 00 Investment Account Account Account Account Accou	inst Western Investment Account	GENERAL ELEC	211	4/19/2007	2/25/2009	1,888 44	7,467 29	(5,578 85)
Investment Account Generated Account Ac	First Western Investment Account	GENENTECH INC	103	3/27/2006	3/26/2009	9,785 00	9,025 89	759 11
Investment Account GENENTECH INC 11 11/13/2006 3/26/2009 1,045 00 919 71 Investment Account Ac	First Western Investment Account	GENENTECH INC	154	8/16/2006	3/26/2009	14,630 00	12,209 12	2,420 88
Investment Account Acco	irst Western Investment Account	GENENTECH INC	7	11/13/2006	3/26/2009	1,045 00	919 71	125 29
Investment Account Acco	irst Western Investment Account	GENENTECH INC	207	4/19/2007	3/26/2009	19,665 00	16,876 71	2,788 29
Investment Account Acco	irst Western Investment Account	KOHLS CORP	77	11/1/2004	11/18/2009	4,264 74	3,941 63	323 11
Investment Account COMCAST CORP CL A 1,938 00 7/3/2007 12/9/2009 30,498 75 54,102 57 54,102 57 54,102 57 54,102 57 54,102 57 552 39 5,703 40 5,703	First Western Investment Account	KOHLS CORP	266	3/27/2006	11/18/2009	14,732 72	13,746 88	985 84
Investment Account COMCAST CORP CL A 478 4/24/2008 12/9/2009 7,522 39 9,703 40 10	inst Western Investment Account	COMCAST CORP CL A	1,938 00	7/3/2007	12/9/2009	30,498 75	54,102 57	(23,603 82)
Investment Account UNITEDHEALTH GROUP INC 12/21/2009 197 09 0 00 11/1,046.59 153,370.83	irst Western Investment Account	COMCAST CORP CL A	478	4/24/2008	12/9/2009	7,522 39	9,703 40	(2,181 01)
111,046.59 153,370.83	inst Western Investment Account	UNITEDHEALTH GROUP INC			12/21/2009	197 09	00 0	197 09
	ONG TERM					111,046.59	153,370.83	(42,324.24)

OVERALL TOTAL

(123,932.33)

451,313.70

327,381.37