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
WHITE, STANLEY FOUNDATION IMA 610215014

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
ATTN: JAMES L. HOUGHTON 6948 S. EVANSTON A

City or town, state, and ZIP code
TULSA, OK 74136

A Employer identification number
73-1519161

B Telephone number (see page 10 of the instructions)
( ) -

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 ▶ ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

H Check type of organization: [X] Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 2,573,599.

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

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	(d) Disbursements for charitable purposes (cash basis only)
Revenue	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				
	4 Dividends and interest from securities	66,276.	66,276.		STMT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-10,132.			
	b Gross sales price for all assets on line 6a 125,370.				
	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)	967.	356.		STMT 4
	12 Total. Add lines 1 through 11	57,111.	66,632.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	34,010.	25,507.		8,502.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 5	1,350.	NONE	NONE	1,350.
	c Other professional fees (attach schedule) STMT 6	80.	80.		80.
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) STMT 7	409.	409.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) STMT 8	321.	321.		
	24 **Total operating and administrative expenses.** Add lines 13 through 23	36,170.	26,317.	NONE	9,932.
	25 Contributions, gifts, grants paid	122,200.			122,200.
	26 Total expenses and disbursements Add lines 24 and 25	158,370.	26,317.	NONE	132,132.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-101,259.			
	b **Net investment income** (if negative, enter -0-)		40,315.		
	c **Adjusted net income** (if negative, enter -0-)				

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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			
2	Savings and temporary cash investments	166,907.	59,171.	59,171.
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) STMT 9	124,314.	124,042.	128,988.
b	Investments - corporate stock (attach schedule) STMT 10	1,763,410.	1,773,036.	1,943,363.
c	Investments - corporate bonds (attach schedule) STMT 14	424,574.	417,509.	442,075.
11	Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
12	Investments - mortgage loans			
13	Investments - other (attach schedule)			
14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶ STMT 15)	2.	2.	2.
16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	2,479,207.	2,373,760.	2,573,599.
Liabilities 17	Accounts payable and accrued expenses			
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 ▶)			
23	**Total liabilities** (add lines 17 through 22)			
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. ▶ X			
27	Capital stock, trust principal, or current funds	2,479,207.	2,373,760.	
28	Paid-in or capital surplus, or land, bldg, and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances** (see page 17 of the instructions)	2,479,207.	2,373,760.	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	2,479,207.	2,373,760.	

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	2,479,207.
2	Enter amount from Part I, line 27a	2	-101,259.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	2,377,948.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 16	5	4,188.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,373,760.

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 DETAIL			
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			(l) Gains (Col (h) gain minus col. (k), but not less than -0-) or Losses (from col (h))
	(i) F M.V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				
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 — -10,132.

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	133,311.	2,721,237.	0.04898911782
2007	140,970.	2,485,112.	0.05672581356
2006	139,243.	2,935,778.	0.04742967622
2005	139,015.	2,846,987.	0.04882881446
2004	139,532.	2,751,223.	0.05071635415

2	**Total** of line 1, column (d)	2	0.25268977621
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	0.05053795524
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	2,261,516.
5	Multiply line 4 by line 3	5	114,292.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	403.
7	Add lines 5 and 6	7	114,695.
8	Enter qualifying distributions from Part XII, line 4	8	132,132.

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 ▶ [X] and enter 1% of Part I, line 27b	1	403.
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	403.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	NONE
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	403.
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 604.		
b	Exempt foreign organizations-tax withheld at source — 6b: NONE		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: NONE		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	604.
8	Enter any **penalty** for underpayment of estimated tax. Check here [ ] if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	201.
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 201. **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 ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
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) ▶ STMT 17			
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 ▶ BANK OF OKLAHOMA NA Telephone no ▶ (918)588-6486

Located at ▶ ONE WILLIAMS CENTER TOWER, TULSA, OK ZIP + 4 ▶ 74172

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		X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)*	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

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
SEE STATEMENT 18		34,010.	-0-	-0-

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
SEE STATEMENT 19		NONE	NONE	NONE

Total number of other employees paid over $50,000 ▶ NONE

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
SEE STATEMENT 20		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 NONE	
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 ▶	

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	2,211,016.
b	Average of monthly cash balances	1b	84,939.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	NONE
d	**Total** (add lines 1a, b, and c)	1d	2,295,955.
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	NONE
3	Subtract line 2 from line 1d	3	2,295,955.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	34,439.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,261,516.
6	**Minimum investment return.** Enter 5% of line 5	6	113,076.

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	113,076.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	403.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	403.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	112,673.
4	Recoveries of amounts treated as qualifying distributions			4	NONE
5	Add lines 3 and 4			5	112,673.
6	Deduction from distributable amount (see page 25 of the instructions)			6	NONE
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	112,673.

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	132,132.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	132,132.
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	403.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	131,729.

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					112,673.
2 Undistributed income, if any, as of the end of 2009					
a Enter amount for 2008 only				101,098.	
b Total for prior years 20 07 ,20 ___ ,20 ___			NONE		
3 Excess distributions carryover, if any, to 2009.					
a From 2004	NONE				
b From 2005	NONE				
c From 2006	NONE				
d From 2007	NONE				
e From 2008	NONE				
f **Total** of lines 3a through e		NONE			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 132,132.					
a Applied to 2008, but not more than line 2a				101,098.	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)			NONE		
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)		NONE			
d Applied to 2009 distributable amount					31,034.
e Remaining amount distributed out of corpus		NONE			
5 Excess distributions carryover applied to 2009 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		NONE			NONE
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		NONE			
b Prior years' undistributed income Subtract line 4b from line 2b			NONE		
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			NONE		
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions			NONE		
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					81,639.
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)		NONE			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)		NONE			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a		NONE			
10 Analysis of line 9					
a Excess from 2005	NONE				
b Excess from 2006	NONE				
c Excess from 2007	NONE				
d Excess from 2008	NONE				
e Excess from 2009	NONE				

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			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
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).)

NONE

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

NONE

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

Check here ▶ [X] 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:

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

c Any submission deadlines:

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

/3-1519161

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE STATEMENT 21				
Total ▶ **3a**				122,200.
b *Approved for future 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		(e) Related or exempt function income (See page 28 of the instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	66,276.	
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	-10,132.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b			14	611.	
c CALAMOS MARKET NEU			14	30.	
d CREDIT SUISSE COMM			14	161.	
e MERGER			14	165.	
12 Subtotal Add columns (b), (d), and (e)				57,111.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 57,111.

(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

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: James L Houghton — Date: 05/11/2010 — Title: Trustee

Paid Preparer's Use Only

Preparer's signature: Michael L McCleve	Date: 5/11/10	Check if self-employed ☐
Preparer's identifying number (See Signature on page 30 of the instructions)	P00236817	
Firm's name (or yours if self-employed), address, and ZIP code	BANK OF OKLAHOMA, N.A. P.O. BOX 1620 TULSA, OK 74101-1620	EIN ▶ 73-0780382 Phone no 918-588-6486

Michael L. McCleve, CPA
Vice President

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)	
		TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS					1,676.	
		100. AFLAC INC COM					12/11/2008	01/27/2009
		PROPERTY TYPE: SECURITIES						
1,991.00		4,283.00					-2,292.00	
		75. ARCHER DANIELS MIDLAND CO					12/11/2008	01/27/2009
		PROPERTY TYPE: SECURITIES						
2,078.00		2,066.00					12.00	
		40. ARCHER DANIELS MIDLAND CO					12/11/2008	03/03/2009
		PROPERTY TYPE: SECURITIES						
1,027.00		1,102.00					-75.00	
		40. BAKER HUGHES INC					12/11/2008	03/03/2009
		PROPERTY TYPE: SECURITIES						
1,106.00		1,250.00					-144.00	
		95. BEST BUY INC					12/28/2004	03/06/2009
		PROPERTY TYPE: SECURITIES						
2,285.00		3,717.00					-1,432.00	
		30. BOEING CO					11/08/2007	02/20/2009
		PROPERTY TYPE: SECURITIES						
1,064.00		2,905.00					-1,841.00	
		60. BOEING CO					12/11/2008	03/03/2009
		PROPERTY TYPE: SECURITIES						
1,780.00		2,422.00					-642.00	
		24. BOEING CO					11/08/2007	03/03/2009
		PROPERTY TYPE: SECURITIES						
712.00		2,324.00					-1,612.00	
		105. BRISTOL MYERS SQUIBB CO					09/26/2007	10/28/2009
		PROPERTY TYPE: SECURITIES						
2,325.00		3,055.00					-730.00	
		480. COMCAST CORP-CL A					12/11/2008	01/26/2009
		PROPERTY TYPE: SECURITIES						
7,354.00		7,838.00					-484.00	

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)	
		15. DANAHER CORP PROPERTY TYPE: SECURITIES					12/11/2008	01/27/2009
838.00		758.00					80.00	
		70. DISNEY, WALT COMPANY PROPERTY TYPE: SECURITIES					11/08/2007	02/20/2009
1,207.00		2,360.00					-1,153.00	
		55. DISNEY, WALT COMPANY PROPERTY TYPE: SECURITIES					11/08/2007	03/03/2009
905.00		1,854.00					-949.00	
		95. DISNEY, WALT COMPANY PROPERTY TYPE: SECURITIES					01/06/2009	04/14/2009
1,819.00		2,245.00					-426.00	
		23. DISNEY, WALT COMPANY PROPERTY TYPE: SECURITIES					11/08/2007	04/14/2009
441.00		775.00					-334.00	
		95. EATON VANCE CORP COM PROPERTY TYPE: SECURITIES					12/11/2008	08/28/2009
2,693.00		2,139.00					554.00	
		215. EATON VANCE CORP COM PROPERTY TYPE: SECURITIES					12/11/2008	09/10/2009
6,098.00		4,842.00					1,256.00	
		275. ELECTRONIC ARTS COM PROPERTY TYPE: SECURITIES					07/29/2009	11/19/2009
4,776.00		6,280.00					-1,504.00	
		35. EMERSON ELECTRIC CO PROPERTY TYPE: SECURITIES					12/11/2008	01/14/2009
1,146.00		1,162.00					-16.00	
		35. EMERSON ELECTRIC CO PROPERTY TYPE: SECURITIES					12/11/2008	02/04/2009
1,155.00		1,162.00					-7.00	
		15. EXXON MOBIL CORP COM PROPERTY TYPE: SECURITIES					08/21/2002	03/03/2009
976.00		545.00					431.00	

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)	
		5. GOLDMAN SACHS GROUP, INC. PROPERTY TYPE: SECURITIES					05/27/2004	10/30/2009
881.00		463.00					418.00	
		75. INTEL CORP PROPERTY TYPE: SECURITIES					12/11/2008	01/14/2009
987.00		1,072.00					-85.00	
		60. INTEL CORP PROPERTY TYPE: SECURITIES					12/11/2008	02/04/2009
823.00		857.00					-34.00	
		25. KOHLS CORP PROPERTY TYPE: SECURITIES					12/11/2008	01/14/2009
885.00		914.00					-29.00	
		30. KOHLS CORP PROPERTY TYPE: SECURITIES					12/11/2008	01/15/2009
1,134.00		1,097.00					37.00	
		70. KOHLS CORP PROPERTY TYPE: SECURITIES					12/11/2008	03/06/2009
2,336.00		2,559.00					-223.00	
		30. MCDONALDS CORP PROPERTY TYPE: SECURITIES					12/11/2008	01/06/2009
1,868.00		1,830.00					38.00	
		90. MEAD JOHNSON NUTRITION PROPERTY TYPE: SECURITIES					02/20/2009	08/13/2009
3,378.00		2,609.00					769.00	
		40. MEAD JOHNSON NUTRITION PROPERTY TYPE: SECURITIES					02/20/2009	08/14/2009
1,512.00		1,160.00					352.00	
		25. MEAD JOHNSON NUTRITION PROPERTY TYPE: SECURITIES					02/20/2009	08/17/2009
939.00		725.00					214.00	
		15. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	05/07/2009
296.00		207.00					89.00	

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)	
		40. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	05/08/2009
791.00		551.00					240.00	
		15. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	05/12/2009
299.00		207.00					92.00	
		5. METLIFE INC PFD SER B 6.5% DUE PERPET PROPERTY TYPE: SECURITIES					12/11/2008	05/15/2009
99.00		69.00					30.00	
		25. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	05/18/2009
500.00		345.00					155.00	
		35. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	05/19/2009
702.00		482.00					220.00	
		15. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	05/20/2009
306 00		207.00					99.00	
		5. METLIFE INC PFD SER B 6.5% DUE PERPET PROPERTY TYPE: SECURITIES					12/11/2008	05/21/2009
102.00		69.00					33.00	
		50. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	05/22/2009
1,020.00		689.00					331.00	
		5. METLIFE INC PFD SER B 6.5% DUE PERPET PROPERTY TYPE: SECURITIES					12/11/2008	05/28/2009
101.00		69.00					32.00	
		20. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	05/29/2009
404.00		276.00					128.00	
		30. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	06/25/2009
608.00		413.00					195.00	

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)	
		35. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	06/29/2009
720.00		482.00					238.00	
		15. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	06/30/2009
308.00		207.00					101.00	
		20. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	07/01/2009
409.00		276.00					133.00	
		20. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	07/07/2009
409.00		276.00					133.00	
		25. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	07/09/2009
520.00		345.00					175.00	
		20. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	07/09/2009
417.00		276.00					141.00	
		20. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	07/14/2009
418.00		276.00					142.00	
		80. METLIFE INC PFD SER B 6.5% DUE PERPE PROPERTY TYPE: SECURITIES					12/11/2008	07/15/2009
1,704.00		1,102.00					602.00	
		5. METLIFE INC PFD SER B 6.5% DUE PERPET PROPERTY TYPE: SECURITIES					12/11/2008	07/16/2009
106.00		69.00					37.00	
		265. MICROCHIP TECHNOLOGY INC COM PROPERTY TYPE: SECURITIES					01/06/2009	11/03/2009
6,306.00		5,350.00					956.00	
		110. MOLSON COORS BREWING CO -B PROPERTY TYPE: SECURITIES					12/11/2008	07/29/2009
4,874.00		4,851.00					23.00	

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)	
		85. NETAPP INC PROPERTY TYPE: SECURITIES					12/11/2008	05/21/2009
1,511.00		1,194.00					317.00	
		110. NETAPP INC PROPERTY TYPE: SECURITIES					12/11/2008	09/09/2009
2,613.00		1,546.00					1,067.00	
		350. NEW YORK CMNTY BANCORP INC COM PROPERTY TYPE: SECURITIES					12/11/2008	02/24/2009
3,324.00		4,039.00					-715.00	
		35. NIKE INC CLASS B PROPERTY TYPE: SECURITIES					12/11/2008	02/20/2009
1,477.00		1,787.00					-310.00	
		90. NOKIA CORP ADR PROPERTY TYPE: SECURITIES					12/11/2008	02/04/2009
1,151.00		1,380.00					-229.00	
		80. NOKIA CORP ADR PROPERTY TYPE: SECURITIES					12/11/2008	02/20/2009
809.00		1,226.00					-417.00	
		260. NOKIA CORP ADR PROPERTY TYPE: SECURITIES					12/11/2008	11/13/2009
3,506.00		3,986.00					-480.00	
		160. PATTERSON-UTI ENERGY INC COM PROPERTY TYPE: SECURITIES					12/11/2008	03/03/2009
1,237.00		1,864.00					-627.00	
		230. PATTERSON-UTI ENERGY INC COM PROPERTY TYPE: SECURITIES					12/11/2008	08/18/2009
3,152.00		2,679.00					473.00	
		25. PRAXAIR INC PROPERTY TYPE: SECURITIES					12/11/2008	02/04/2009
1,591.00		1,463.00					128.00	
		20. PRAXAIR INC PROPERTY TYPE: SECURITIES					12/11/2008	09/17/2009
1,602.00		1,170.00					432.00	

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)	
		170. PRUDENTIAL FINANCIAL INC PROPERTY TYPE: SECURITIES					12/11/2008	03/03/2009
2,171.00		4,753.00					-2,582.00	
		58. SCHLUMBERGER LTD PROPERTY TYPE: SECURITIES					08/13/2007	08/31/2009
3,257.00		5,262.00					-2,005.00	
		100. SYSCO CORP PROPERTY TYPE: SECURITIES					07/02/2004	06/01/2009
2,421.00		3,486.00					-1,065.00	
		75. SYSCO CORP PROPERTY TYPE: SECURITIES					07/02/2004	10/28/2009
2,025.00		2,615.00					-590.00	
		30. TEVA PHARMACEUTICAL INDS LTD ADR PROPERTY TYPE: SECURITIES					06/30/2008	02/20/2009
1,384.00		1,387.00					-3.00	
		25. UNITED TECHNOLOGIES PROPERTY TYPE: SECURITIES					05/20/2003	04/14/2009
1,146.00		828.00					318.00	
		95. VERIZON COMMUNICATIONS COM PROPERTY TYPE: SECURITIES					12/11/2008	06/01/2009
2,798.00		3,093.00					-295.00	
		70. VERIZON COMMUNICATIONS COM PROPERTY TYPE: SECURITIES					12/11/2008	10/20/2009
2,014.00		2,279.00					-265.00	
		75. VERIZON COMMUNICATIONS COM PROPERTY TYPE: SECURITIES					12/11/2008	10/21/2009
2,161.00		2,442.00					-281.00	
		25. WATERS CORP PROPERTY TYPE: SECURITIES					12/11/2008	09/09/2009
1,336.00		1,027.00					309.00	
		50. WEATHERFORD INTL LTD PROPERTY TYPE: SECURITIES					12/11/2008	09/09/2009
1,070.00		532.00					538.00	

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)	
TOTAL GAIN(LOSS)							-10,132.	

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INVESCO REAL ESTATE FD FD#4725	1,578.	1,578.
ALTRIA GROUP INC	670.	670.
APACHE CORPORATION	65.	65.
ARCHER DANIELS MIDLAND CO	160.	160.
AVON PRODUCTS INC	168.	168.
BAKER HUGHES INC	113.	113.
BANK AMER CORP COM	35.	35.
BECTON DICKINSON & CO COM	156.	156.
BEST BUY INC	175.	175.
BOEING CO	48.	48.
BRISTOL MYERS SQUIBB CO	583.	583.
CVS CORP	62.	62.
CALAMOS MARKET NEUTRAL-A FD#0605	622.	622.
CAVANAL HILL CSH MG INST CL FD#0051	350.	350.
CHESAPEAKE ENERGY CORP	48.	48.
COMCAST CORP-CL A	30.	30.
CREDIT SUISSE COMM RETN ST FD#2156	3,334.	3,334.
DANAHER CORP	13.	13.
DEVON ENERGY CORPORATIOIN	50.	50.
DIAMOND HILL LONG/SHORT-I FD#0011	5.	5.
DISNEY, WALT COMPANY	52.	52.
DISCOVER FINANCIAL SERVICE	7.	7.
EATON VANCE CORP COM	144.	144.
ECOLAB INC	73.	73.
EMERSON ELECTRIC CO	235.	235.
EXXON MOBIL CORP COM	184.	184.
FAMILY DLR STORES INC	113.	113.
FEDEX CORP COM	61.	61.
FIDELITY LEVERAGED CO STOCK FD#0122	306.	306.
FLUOR CORP	11.	11.
GNMA POOL # 535878 @ 6.500% DUE 10/1	199.	199.
GNMA POOL # 568836 @ 6.500% DUE 10/1	374.	374.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
GOLDMAN SACHS GROUP, INC.	184.	184.
HALLIBURTON COMPANY	76.	76.
HEALTHCARE SERVICES GROUP	640.	640.
HEINZ HJ COMPANY	217.	217.
HEWLETT PACKARD COMPANY	61.	61.
INTEL CORP	336.	336.
INTERNATIONAL BUSINESS MACHINES	97.	97.
ISHARES DJ SELECT DIVIDEND FD	1,267.	1,267.
ISHARES BARCLAYS AGGREGATE BOND FUND	3,208.	3,208.
ISHARES IBOXX $ INVESTMENT GRADE CORPORA	2,490.	2,490.
ISHARES TR MSCI EAFE INDEX	3,948.	3,948.
ISHARES TR RUSSELL MIDCAP VALUE INDEX FD	1,096.	1,096.
ISHARES RUSSELL MIDCAP GRWTH FD	503.	503.
ISHARES TR S&P MDCP400 IDX	736.	736.
ISHARES RUSSELL 2000 VA	874.	874.
ISHARES TR RUSSELL 2000 GR	285.	285.
ISHARES TR RSSLL 2000 INDX	376.	376.
JP MORGAN CHASE & CO	24.	24.
KIMBERLY CLARK CORP	135.	135.
L-3 COMMUNICATIONS HLDGS INC	104.	104.
MATTEL INC	304.	304.
MCDONALDS CORP	226.	226.
MEAD JOHNSON NUTRITION	47.	47.
MERGER FD#0260	257.	257.
METLIFE INC PFD SER B 6.5% DUE PERPETUAL	323.	323.
MICROCHIP TECHNOLOGY INC COM	270.	270.
MOLSON COORS BREWING CO -B	48.	48.
NATIONAL-OILWELL INC	132.	132.
NEW YORK CMNTY BANCORP INC COM	88.	88.
NIKE INC CLASS B	101.	101.
NOKIA CORP ADR	141.	141.
NORFOLK SOUTHERN CORP	125.	125.
PIMCO TOTAL RETURN FUND INST#35	5,549.	5,549.

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
PATTERSON-UTI ENERGY INC COM	23.	23.
PEPSI CO INC	1,031.	1,031.
PHILIP MORRIS INTERNATIONAL	1,642.	1,642.
PIMCO ALL ASSET-INST FD#0034	12,637.	12,637.
PRAXAIR INC	144.	144.
PRICE T ROWE GROUP INC COM	240.	240.
QUALCOMM INC	203.	203.
REPUBLIC SVCS INC CL A	205.	205.
SCHLUMBERGER LTD	97.	97.
HEALTH CARE SELECT SECTOR FD	473.	473.
STRYKER CORP	75.	75.
SYSCO CORP	404.	404.
TJX COMPANYS (NEW)	101.	101.
TEMPLETON GLOBAL BD-ADV FD#0616	3,146.	3,146.
TEVA PHARMACEUTICAL INDS LTD ADR	47.	47.
TEXAS INSTRUMENTS INC	108.	108.
US BANCORP DEL NEW COM NEW	33.	33.
U S TREASURY NOTE @ 3.500% 01/15/11 TRE	4,034.	4,034.
UNITED TECHNOLOGIES	203.	203.
VALERO REFNG & MARKETING CO	107.	107.
VANGUARD S/T BD INDX-SIG FD#1349	1,193.	1,193.
VANGUARD INTERMED INDX-INST FD#0504	1,936.	1,936.
VERIZON COMMUNICATIONS COM	356.	356.
VISA INC-CLASS A SHARES	36.	36.
WAL-MART STORES C/S	425.	425.
WESTCORE PLUS BOND FD#0198	2,699.	2,699.
THE WILLIAMS COMPANIES, INC	185.	185.
XTO ENERGY INC COM	50.	50.
ACCENTURE PLC-A	146.	146.
NOBLE CORPORATION SHS	5.	5.
TOTAL	66,276.	66,276.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
	TOTALS	967.	356.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEE (ALLOCABLE	1,350.			1,350.
TOTALS	1,350.	NONE	NONE	1,350.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
OTHER ALLOCABLE EXPENSES - 2%	80.	80.	80.
TOTALS	80.	80.	80.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES	31.	31.
FOREIGN TAXES ON QUALIFIED FOR	309.	309.
FOREIGN TAXES ON NONQUALIFIED	69.	69.
TOTALS	409.	409.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
OTHER NON-ALLOCABLE EXPENSE -	321.	321.
TOTALS	321.	321.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
US TREAS INDEX 3.5 % 1/15/11	124,042.	128,988.
TOTALS	124,042.	128,988.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
NEUBERGER BERMAN GENESIS INST	30,077.	29,401.
T ROWE PRICE GRP INC	8,171.	12,780.
WILLIAMS COS INC	9,138.	8,875.
AFLAC INC		
EATON VANCE CORPP		
BOEING CO		
NOKIA CORP-SPON ADR		
TEVA PHARMACEUTICAL-SP ADR	3,487.	4,382.
AVON PRODUCTS INC	4,568.	6,300.
NIKE INC CL B	6,892.	8,919.
VISA INC CLASS A	4,978.	7,871.
KOHLS CORP	7,809.	11,325.
FAMILY DLR STORES INC	6,600.	7,792.
HJ HEINZ CO	4,913.	5,986.
PATTERSON-UTI ENERGY INC		
WAL-MART STORES	21,527.	21,540
NEW YORK COMMUNITY BANCORP		
PHILIP MORRIS INTL	23,003.	36,624.
APACHE CORPORATION	2,506.	11,246.
EXXON MOBIL CORP	4,067.	7,296.
PRUDENTIAL FINANCIAL INC		
BANK AMER CORP	22,189.	16,430.
WATERS CORP	4,311.	6,506.
ARCHER-DANIELS-MIDLAND CO	7,576.	8,610.
XTO ENERGY INC	3,835.	4,653.
PRAXAIR INC	4,388.	6,023.
CISCO SYSTEMS INC	9,759.	14,101.
HEWLETT-PACKARD CO	7,671.	11,847.
INTL BUSINESS MACHINES CORP	3,904.	5,891.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
TEXAS INSTRUMENTS INC	5,561.	6,254.
MICROCHIP TECHNOLOGY INC		
FLUOR CORP	4,757.	3,828.
THERMO FISHER SCIENTIFIC INC	7,462.	10,492.
ECOLAB INC	4,664.	5,795.
ISHARES S&P MIDCAP 400 FD	36,139.	57,638.
APPLE INC COM	14,358.	28,449.
UNITED TECHNOLOGIES CORP	5,050.	9,509.
FEDEX CORP	7,196.	9,847.
VERIZON COMMUNICATIONS		
COMCAST CORP CL A		
PEPSICO INC	28,952.	38,396.
ALTRIA GROUP INC	5,719.	10,109.
HALLIBURTON COMPANY	3,541.	6,319.
REPUBLIC SERVICES INC	6,368.	7,644.
ISHARES MSCI EAFE INDEX FD	121,945.	139,582.
DANAHER CORP	5,308.	7,896.
NETAPP INC	4,285.	10,480.
INTEL CORP	8,360.	11,934.
BEST BUY INC	12,429.	12,588.
SYSCO CORP	8,768.	8,801.
GOLDMAN SACHS GROUP INC	11,688.	20,598.
MOLSON COORS BREWING CO-B		
STRYKER CORP	6,002.	7,556.
APPLE INC COM	13,102.	86,822.
NATIONAL OILWELL VARCO INC	3,095.	5,291.
EMERSON ELECTRIC CO	6,818.	8,520.
ISHARES DJ SELECT DIVIDEND FD	41,492.	33,503.
L-3 COMMUNICATIONS HOLDINGS	5,237.	6,434.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
HEALTHCARE SERVICES GROUP	10,022.	18,563.
TJX COMPANIES INC	4,633.	8,224.
BAKER HUGHES INC	7,600.	9,513.
MCDONALDS CORP	6,709.	6,868.
CHESAPEAKE ENERGY CORP	2,898.	4,141.
HEALTH CARE SELECT SECTOR FD	26,089.	25,571.
WEATHERFORD INTL LTD	3,650.	5,015.
GENZYME CORP	10,448.	8,332.
YAHOO! INC	22,420.	16,847.
ISHARES RUSSELL MIDCAP VALUE F	61,974.	52,395.
ISHARES RUSSELL MIDCAP GRWTH F	61,864.	57,536.
ISHARES RUSSELL 2000 VALUE FD	59,871.	48,115.
ISHARES RUSSELL 2000 GROWTH FD	62,158.	56,430.
ISHARES RUSSELL 2000 FD	22,210.	32,594.
NORFOLK SOUTHERN CORP	4,671.	4.823.
THE WALT DISNEY CO		
NOBLE CORP	6,717.	5,454.
SCHLUMBERGER LTD		
BECTON DICKINSON & CO	9,750.	10,883.
BRISTOL MYERS SQUIBB CO	3,985.	4,242
QUALCOMM INC	11,586.	13,600.
CALAMOS MARKET NEUTRAL - A	35,873.	34,017.
CREDIT SUISSE COMM RETN ST FD	70,022.	53,173.
DIAMOND HILL LONG/SHORT I	212,921.	203,356.
FIDELITY LEVERAGED CO STOCK FD	71,876.	61,459.
MERGER FD	71,597.	72,556.
PIMCO ALL ASSET FUND INST	175,284.	166,764.
APOLLO GROUP INC - CL A	5,057.	5,149.
MATTEL INC	4,986.	8,092.

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
KIMBERLY-CLARK CORP	3,923.	4,778.
CVS CAREMARK CORP	8,939.	10,307.
MEAD JOHNSON NUTRITION	4,673.	5,436.
VALERO ENERGY CORP	4,884.	4,271.
DEVON ENERGY CORPORATION	5,815.	8,085.
SMITH INTERNATIONAL INC	6,896.	6,657.
US BANCORP	6,262.	6,415.
DISCOVER FINANCIAL SERVICE	4,862.	4,928.
JPMORGAN CHASE & CO	3,266.	6,667.
BOSTON SCIENTIFIC CORP	9,167.	7,965.
ACCENTURE PLC - A	5,438.	8,093.
DELL INC	6,211.	5,744.
INVESCO REAL ESTATE FD	76,164.	61,622.
TOTALS	1,773,036.	1,943,363.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

FORM 990PF, PART II - CORPORATE BONDS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
MEDLIFE INC PFD 6.5% SERIES B		
VANGUARD INTERMED INDX-INST	40,082.	42,333.
ISHARES BARCLAYS AGGREGATE BD	79,480.	82,552.
GNMA POOL#535878 6.5% 10/15/31	3,035.	3,277.
GNMA POOL#568836 6.5% 10/15/31	5,275.	5,696.
VANGUARD S/T BD INDX-SIG	40,042.	40,986.
PIMCO TOTAL RETURN-INST	84,730.	88,954.
ISHARES IBOXX $ INVESTMENT GR	39,885.	45,305.
TEMPLETON GLOBAL BD AD FD	61,008.	68,568.
WESTCORE PLUS BOND FUND	63,972.	64,404.
TOTALS	417,509.	442,075.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

FORM 990PF, PART II - OTHER ASSETS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
AGENCY AGREEMENT	1.	1.
ASSET RETENTION LETTER	1.	1.
TOTALS	2.	2.

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

DESCRIPTION		AMOUNT
FUND BAL ADJ		4,188.
	TOTAL	4,188.

STATE(S) WHERE THE FOUNDATION IS REGISTERED

OK

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

OFFICER NAME:
MICHAEL FRETZ
ADDRESS:
316 E. MAIN
JENKS, OK 74037
TITLE:
PRESIDENT
COMPENSATION .... 5,000.

OFFICER NAME:
JAMES . HOUGHTON
ADDRESS:
6948 S. EVANSTON
TULSA, OK 74136
TITLE:
TREASURER
COMPENSATION .... 5,000.

OFFICER NAME:
JOHN B. JOHNSON
ADDRESS:
15 W 6TH ST., SUITE 2200
TULSA, OK 74119-5416
TITLE:
SECRETARY
COMPENSATION .... 5,000.

OFFICER NAME:
BANK OF OKLAHOMA, N.A., AGENT
ADDRESS:
PO BOX 1620
TULSA, OK 74132
TITLE:
AGENT
COMPENSATION .... 19,010.

TOTAL COMPENSATION: 34,010.

990PF, PART VIII - COMPENSATION OF THE FIVE HIGHEST PAID EMPLOYEES
==

EMPLOYEE NAME:
NONE

STATEMENT 19

990PF, PART VIII- COMPENSATION OF THE FIVE HIGHEST PAID PROFESSIONALS
===

NAME:
NONE

FORM 990PF, PART XV, LINE 3 - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:
THE UNIVERSITY OF TULSA
ADDRESS:
ATTN: MIRANDA PUGH
TULSA, OK 74104-3189

RECIPIENT NAME:
TULSA AREA UNITED WAY
ADDRESS:
PO BOX 1859
TULSA, OK 74101-1859
PURPOSE OF GRANT:
TO FURTHER CHARITABLE PURPOSES
AMOUNT OF GRANT PAID .... 2,200.

RECIPIENT NAME:
UNIVERSITY OF OKLAHOMA
ADDRESS:
600 PARRINGTON OVAL RM
NORMAN, OK 73019-0390
PURPOSE OF GRANT:
ESTABLISH A CENTER FOR ENTREPRENEURSHIP
AMOUNT OF GRANT PAID .... 120,000.

TOTAL GRANTS PAID: 122,200.

WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
100. AFLAC INC COM	12/11/2008	01/27/2009	1,991.00	4,283.00	-2,292.00
75. ARCHER DANIELS MIDLAND	12/11/2008	01/27/2009	2,078.00	2,066.00	12.00
40. ARCHER DANIELS MIDLAND	12/11/2008	03/03/2009	1,027.00	1,102.00	-75.00
40. BAKER HUGHES INC	12/11/2008	03/03/2009	1,106.00	1,250.00	-144.00
60. BOEING CO	12/11/2008	03/03/2009	1,780.00	2,422.00	-642.00
480. COMCAST CORP-CL A	12/11/2008	01/26/2009	7,354.00	7,838.00	-484.00
15. DANAHER CORP	12/11/2008	01/27/2009	838.00	758.00	80.00
95. DISNEY, WALT COMPANY	01/06/2009	04/14/2009	1,819.00	2,245.00	-426.00
95. EATON VANCE CORP COM	12/11/2008	08/28/2009	2,693.00	2,139.00	554.00
215. EATON VANCE CORP COM	12/11/2008	09/10/2009	6,098.00	4,842.00	1,256.00
275. ELECTRONIC ARTS COM	07/29/2009	11/19/2009	4,776.00	6,280.00	-1,504.00
35. EMERSON ELECTRIC CO	12/11/2008	01/14/2009	1,146.00	1,162.00	-16.00
35. EMERSON ELECTRIC CO	12/11/2008	02/04/2009	1,155.00	1,162.00	-7.00
75. INTEL CORP	12/11/2008	01/14/2009	987.00	1,072.00	-85.00
60. INTEL CORP	12/11/2008	02/04/2009	823.00	857.00	-34.00
25. KOHLS CORP	12/11/2008	01/14/2009	885.00	914.00	-29.00
30. KOHLS CORP	12/11/2008	01/15/2009	1,134.00	1,097.00	37.00
70. KOHLS CORP	12/11/2008	03/06/2009	2,336.00	2,559.00	-223.00
30. MCDONALDS CORP	12/11/2008	01/06/2009	1,868.00	1,830.00	38 00
90. MEAD JOHNSON NUTRITION	02/20/2009	08/13/2009	3,378.00	2,609.00	769.00
40. MEAD JOHNSON NUTRITION	02/20/2009	08/14/2009	1,512.00	1,160.00	352.00
25. MEAD JOHNSON NUTRITION	02/20/2009	08/17/2009	939.00	725.00	214.00
15. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/07/2009	296.00	207.00	89.00
40. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/08/2009	791.00	551.00	240.00
15. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/12/2009	299.00	207.00	92.00
5. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/15/2009	99.00	69.00	30.00
25. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/18/2009	500.00	345.00	155.00
Totals					

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WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
35. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/19/2009	702.00	482.00	220.00
15. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/20/2009	306.00	207.00	99.00
5. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/21/2009	102.00	69.00	33.00
50. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/22/2009	1,020.00	689.00	331.00
5. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/28/2009	101.00	69.00	32.00
20. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	05/29/2009	404.00	276.00	128.00
30. METLIFE INC PFD SER B					
6 5% DUE PERPETUAL	12/11/2008	06/25/2009	608.00	413.00	195.00
35. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	06/29/2009	720.00	482.00	238.00
15. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	06/30/2009	308.00	207.00	101.00
20 METLIFE INC PFD SER B					
6 5% DUE PERPETUAL	12/11/2008	07/01/2009	409.00	276.00	133.00
20. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	07/07/2009	409.00	276.00	133.00
25. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	07/09/2009	520.00	345.00	175.00
20. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	07/09/2009	417.00	276.00	141.00
20. METLIFE INC PFD SER B					
6 5% DUE PERPETUAL	12/11/2008	07/14/2009	418.00	276.00	142.00
80. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	07/15/2009	1,704.00	1,102.00	602.00
5. METLIFE INC PFD SER B					
6.5% DUE PERPETUAL	12/11/2008	07/16/2009	106.00	69.00	37.00
265. MICROCHIP TECHNOLOGY	01/06/2009	11/03/2009	6,306.00	5,350.00	956.00
110. MOLSON COORS BREWING	12/11/2008	07/29/2009	4,874.00	4,851.00	23.00
85. NETAPP INC	12/11/2008	05/21/2009	1,511.00	1,194.00	317.00
Totals					

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WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
110. NETAPP INC	12/11/2008	09/09/2009	2,613.00	1,546.00	1,067.00
350. NEW YORK CMNTY	12/11/2008	02/24/2009	3,324.00	4,039.00	-715.00
35. NIKE INC CLASS B	12/11/2008	02/20/2009	1,477.00	1,787.00	-310.00
90. NOKIA CORP ADR	12/11/2008	02/04/2009	1,151.00	1,380.00	-229.00
80. NOKIA CORP ADR	12/11/2008	02/20/2009	809.00	1,226.00	-417.00
260. NOKIA CORP ADR	12/11/2008	11/13/2009	3,506.00	3,986.00	-480.00
160. PATTERSON-UTI ENERGY	12/11/2008	03/03/2009	1,237.00	1,864.00	-627.00
230. PATTERSON-UTI ENERGY	12/11/2008	08/18/2009	3,152.00	2,679.00	473.00
25. PRAXAIR INC	12/11/2008	02/04/2009	1,591.00	1,463.00	128.00
20. PRAXAIR INC	12/11/2008	09/17/2009	1,602.00	1,170.00	432.00
170. PRUDENTIAL FINANCIAL	12/11/2008	03/03/2009	2,171.00	4,753.00	-2,582.00
30. TEVA PHARMACEUTICAL	06/30/2008	02/20/2009	1,384.00	1,387.00	-3.00
95. VERIZON COMMUNICATIONS	12/11/2008	06/01/2009	2,798.00	3,093.00	-295.00
70. VERIZON COMMUNICATIONS	12/11/2008	10/20/2009	2,014.00	2,279.00	-265.00
75. VERIZON COMMUNICATIONS	12/11/2008	10/21/2009	2,161.00	2,442.00	-281 00
25. WATERS CORP	12/11/2008	09/09/2009	1,336.00	1,027.00	309.00
50 WEATHERFORD INTL LTD	12/11/2008	09/09/2009	1,070.00	532.00	538.00
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			104,049.00	105,313.00	-1,264.00
Totals			104,049.00	105,313.00	-1,264.00

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WHITE, STANLEY FOUNDATION IMA 610215014 73-1519161

Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
95. BEST BUY INC	12/28/2004	03/06/2009	2,285.00	3,717.00	-1,432.00
30. BOEING CO	11/08/2007	02/20/2009	1,064.00	2,905.00	-1,841.00
24. BOEING CO	11/08/2007	03/03/2009	712.00	2,324.00	-1,612.00
105. BRISTOL MYERS SQUIBB	09/26/2007	10/28/2009	2,325.00	3,055.00	-730.00
70. DISNEY, WALT COMPANY	11/08/2007	02/20/2009	1,207.00	2,360.00	-1,153.00
55. DISNEY, WALT COMPANY	11/08/2007	03/03/2009	905.00	1,854.00	-949.00
23. DISNEY, WALT COMPANY	11/08/2007	04/14/2009	441.00	775.00	-334.00
15. EXXON MOBIL CORP COM	08/21/2002	03/03/2009	976.00	545.00	431.00
5. GOLDMAN SACHS GROUP,	05/27/2004	10/30/2009	881.00	463.00	418.00
58. SCHLUMBERGER LTD	08/13/2007	08/31/2009	3,257.00	5,262.00	-2,005.00
100. SYSCO CORP	07/02/2004	06/01/2009	2,421.00	3,486.00	-1,065.00
75. SYSCO CORP	07/02/2004	10/28/2009	2,025.00	2,615.00	-590.00
25. UNITED TECHNOLOGIES	05/20/2003	04/14/2009	1,146.00	828.00	318.00
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			19,645.00	30,189.00	-10,544.00
Totals			19,645.00	30,189.00	-10,544.00

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FEDERAL CAPITAL GAIN DIVIDENDS

LONG-TERM CAPITAL GAIN DIVIDENDS

15% RATE CAPITAL GAIN DIVIDENDS

AMERICAN INTL GROUP INC	301.00	
CARDINAL HEALTH INC	663.00	
EL PASO CORP COM	242.00	
FEDERAL HOME LN MTG CORP	21.00	
PIMCO TOTAL RETURN FUND INST#35	197.00	
TENET HEALTHCARE CORP	247.00	
VANGUARD S/T BD INDX-SIG FD#1349	4.00	
TOTAL 15% RATE CAPITAL GAIN DIVIDENDS		1,676.00
TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS		1,676.00