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Form **990-PF****Return of Private Foundation**

OMB No 1545-0052

**2009**Department of the Treasury  
Internal Revenue Service**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.

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

6 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 <b>C.B. AND ANITA BRANCH TRUST</b>		A Employer identification number <b>74-6431994</b>
	ANITA BRANCH, TRUSTEE		B Telephone number <b>830-249-6102</b>
	Number and street (or P O box number if mail is not delivered to street address) <b>103 RANGER CREEK ROAD</b>		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
	Room/suite <b>BOERNE, TX 78006-5624</b>		
City or town, state, and ZIP code			
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 10,398,429.</b> (Part I, column (d) must be on cash basis.)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		445,489.	445,489.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<260,046.>			
b Gross sales price for all assets on line 6a		675,513.			
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit (loss)					
11 Other income					
12 Total. Add lines 1 through 11		185,443.	445,489.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		7,915.	7,915.		0.
c Other professional fees					
17 Interest					
18 Taxes		6,739.	6,739.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses		1,950.	1,950.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		16,604.	16,604.		0.
25 Contributions, gifts, grants paid		543,050.			543,050.
26 Total expenses and disbursements. Add lines 24 and 25		559,654.	16,604.		543,050.
27 Subtract line 26 from line 12:		<374,211.>			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			428,885.		
c Adjusted net income (if negative, enter -0-)				N/A	

**C.B. AND ANITA BRANCH TRUST**  
**ANITA BRANCH, TRUSTEE**

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<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	823,329.	639,804.	639,804.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock <b>STMT 5</b>	2,928,562.	2,737,614.	4,367,508.
	c Investments - corporate bonds <b>STMT 6</b>	4,382,452.	4,482,452.	4,902,572.
<b>Liabilities</b>	11 Investments - land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other <b>STMT 7</b>	1,674,131.	1,574,496.	476,120.
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶ <b>STATEMENT 8</b> )	12,528.	12,425.	12,425.
	<b>16 Total assets (to be completed by all filers)</b>	<b>9,821,002.</b>	<b>9,446,791.</b>	<b>10,398,429.</b>
	17 Accounts payable and accrued expenses			
	18 Grants payable			
<b>Net Assets or Fund Balances</b>	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	<b>23 Total liabilities (add lines 17 through 22)</b>	<b>0.</b>	<b>0.</b>	
	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>			
	<b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
<b>Net Assets or Fund Balances</b>	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>			
	<b>and complete lines 27 through 31.</b>			
	27 Capital stock, trust principal, or current funds	10,463,994.	9,821,002.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	<642,992.>	<374,211.>	
<b>Net Assets or Fund Balances</b>	<b>30 Total net assets or fund balances</b>	<b>9,821,002.</b>	<b>9,446,791.</b>	
	<b>31 Total liabilities and net assets/fund balances</b>	<b>9,821,002.</b>	<b>9,446,791.</b>	

**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	9,821,002.
2 Enter amount from Part I, line 27a	2	<374,211.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	9,446,791.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	9,446,791.

**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					
b SEE ATTACHED STATEMENT					
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 675,513.		935,559.	<260,046.>		
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e			<260,046.>		
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	<260,046.>	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8			3	N/A	

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

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

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

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

☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	641,014.	1,022,159.	.627118
2007	678,401.	12,526,880.	.054156
2006	492,501.	11,917,403.	.041326
2005	481,660.	11,494,357.	.041904
2004	399,446.	10,903,111.	.036636
2 Total of line 1, column (d)			.801140
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			.160228
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			8,828,390.
5 Multiply line 4 by line 3			1,414,555.
6 Enter 1% of net investment income (1% of Part I, line 27b)			4,289.
7 Add lines 5 and 6			1,418,844.
8 Enter qualifying distributions from Part XII, line 4			543,050.

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.

**C.B. AND ANITA BRANCH TRUST**  
**ANITA BRANCH, TRUSTEE**
**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	8,578.
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	0.
3 Add lines 1 and 2		3	8,578.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	8,578.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	4,960.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	4,960.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	2.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	3,620.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> TX		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	X	

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**ANITA BRANCH, TRUSTEE**

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**Part VII-A Statements Regarding Activities** (continued)

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

Website address ► **N/A**

14 The books are in care of ► **MANGUM, SCHIEFFER, BRADLEY & CO PLLC** Telephone no. ► **210-477-8797**  
 Located at ► **7373 BROADWAY, SUITE 109, SAN ANTONIO, TX** ZIP+4 ► **78209**

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

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
<b>1a</b> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b> If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	<b>N/A</b> ► <input type="checkbox"/>	<b>1b</b>	
<b>c</b> 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?		<b>1c</b>	X
<b>2</b> 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)):			
<b>a</b> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes," list the years ► _____			
<b>b</b> Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	<b>N/A</b>	<b>2b</b>	
<b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____			
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</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.)	<b>N/A</b>	<b>3b</b>	
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		<b>4a</b>	X
<b>b</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?		<b>4b</b>	X

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## C.B. AND ANITA BRANCH TRUST

ANITA BRANCH, TRUSTEE

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANITA BRANCH	TRUSTEE			
103 RANGER CREEK RD				
BOERNE, TX 78006	3.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

0

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## Part VIII

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

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

[illegible]**Total number of others receiving over \$50,000 for professional services**

0

Part IX-A	Summary of Direct Charitable Activities
-----------	---

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

## Expenses

1	N/A	
2		
3		
4		

<b>Part IX-B</b>	<b>Summary of Program-Related Investments</b>
------------------	---

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

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

**Total. Add lines 1 through 3**

0.

Form **990-PF** (2009)

**C.B. AND ANITA BRANCH TRUST**  
**ANITA BRANCH, TRUSTEE**
**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	8,424,171.
b	Average of monthly cash balances	1b	538,661.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	8,962,832.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	8,962,832.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	134,442.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,828,390.
6	Minimum investment return. Enter 5% of line 5	6	441,420.

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

1	Minimum investment return from Part X, line 6	1	441,420.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	8,578.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	8,578.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	432,842.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	432,842.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	432,842.

**Part XII Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	543,050.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	543,050.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	543,050.

**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.

**C.B. AND ANITA BRANCH TRUST**  
**ANITA BRANCH, TRUSTEE**
**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				432,842.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008	7,554.			
f Total of lines 3a through e	7,554.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$	543,050.			
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				432,842.
e Remaining amount distributed out of corpus	110,208.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	117,762.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	117,762.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008	7,554.			
e Excess from 2009	110,208.			

N/A

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

- [illegible]

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





**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.

**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

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.

Form **990-PF** (2009)

**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 MERRILL LYNCH S-T CAPITAL GAINS		P	VARIOUS	07/22/09
b MERRILL LYNCH S-T CAPITAL LOSSES		P	09/09/08	06/30/09
c MERRILL LYNCH L-T CAPITAL GAINS		P	VARIOUS	VARIOUS
d MERRILL LYNCH L-T CAPITAL LOSSES		P	VARIOUS	VARIOUS
e MERRILL LYNCH CASH IN LIEU		P	VARIOUS	VARIOUS
f CAPITAL GAINS DIVIDENDS				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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 25,187.		24,300.	887.
b 49,368.		51,000.	<1,632.>
c 348,076.		336,000.	12,076.
d 247,085.		524,259.	<277,174.>
e 24.			24.
f 5,773.			5,773.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			887.
b			<1,632.>
c			12,076.
d			<277,174.>
e			24.
f			5,773.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	<260,046.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }		3	N/A





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C B BRANCH TTEE

### 2009 TAX REPORTING STATEMENT

Your Tax Reporting Statement information that follows is a personal summary of your account activity and is not reported to the IRS.

The Capital Gain and Loss Transaction section is provided to facilitate your review and the preparation of your tax return. In calculating gain (loss), unless otherwise noted, it was assumed that the oldest position was liquidated first and that an election was in effect to amortize the premium paid on the purchase of taxable bonds. The gain (loss) information may not include return of capital, sales load deferral or wash sales adjustments. RICs (which may include mutual funds and unit investment trusts) may reclassify principal distributions as capital gains. The Cost Basis for these securities may not have been adjusted on your statement to reflect such reclassifications. Please refer to information provided by the RIC and discuss with your tax advisor. Securities distributed from a retirement account reflect the tax basis on the date of distribution. Other methods for calculating gain (loss) are available. The cost basis for most Original Issue Discount ("OID") obligations includes the accretion of OID. For purposes of allocating original purchase price to the components of an equity unit consisting of a purchase contract and a debt security subject to a remarketing event, we assumed that the fair market value of the debt security on purchase date was equal to its adjusted issue price. The difference between your original cost and the amount allocable to the debt component was allocated to the purchase contract. In making adjustments to the cost basis of the purchase contract, it was assumed that the unit holder included contract adjustment payments in income when received.

Data from Forms 1099 (reportable Dividend and Interest) is also repeated in this summary for your convenience. Additionally, we have included items such as margin interest and select account fees if applicable. Please discuss the deductibility of these items with your tax advisor. For select clients, we have also included a summary of Visa charges and checking activity.

Merrill Lynch is neither a tax return preparer or tax advisor. Please see your tax advisor for more information.

### 2009 CAPITAL GAIN AND LOSS TRANSACTIONS

Security Description	Quantity	Date Acquired Cover of Short	Date Liquidated Short Sale	Amortization/Accretion Year-to-Date	Life-to-Date	Sales Price	Cost Basis	Gain or (Loss)
<b>SHORT TERM CAPITAL GAINS</b>								
RUBY TUESDAY INC PV\$ 01	1800 0000	07/22/09	09/02/09			12,626.90	12,150.00	476.90
	1800 0000	07/22/09	09/02/09			12,560.25	12,150.00	410.25
	Security Subtotal					25,187.15	24,300.00	887.15
	Short Term Capital Gains Subtotal					25,187.15	24,300.00	887.15
<b>SHORT TERM CAPITAL LOSSES</b>								
TYSON FOODS INC CL A	4000 0000	09/09/08	06/30/09			49,367.76	51,000.00	(1,632.24)
	Short Term Capital Losses Subtotal					49,367.76	51,000.00	(1,632.24)
NET SHORT TERM CAPITAL GAIN (LOSS)								(745.09)
<b>LONG TERM CAPITAL GAINS</b>								
CD WESTERNBANK PR	98000 0000	05/17/04	05/26/09			98,000.00	98,000.00	0.00
CD S&C BANK	98000 0000	11/15/04	11/24/09			98,000.00	98,000.00	0.00



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C B BRANCH TTEE

2009 TAX REPORTING STATEMENT

2009 CAPITAL GAIN AND LOSS TRANSACTIONS

Security Description	Quantity	Date Acquired Cover of Short	Date Liquidated Short Sale	Amortization/Accretion Year-to-Date	Life-to-Date	Sales Price	Cost Basis	Gain or (Loss)
CD CAPITAL ONE BK (USA)	100000 0000	05/17/04	05/28/09			100,000 00	100,000 00	0 00
HECLA MINING CO DEL	8000 0000	09/08/08	12/14/09			52,075 72	40,000 00	12,075 72
Long Term Capital Gains Subtotal						348,075.72	336,000.00	12,075.72

LONG TERM CAPITAL LOSSES

AMERICAN INTL GROUP	1000 0000	05/29/07	06/30/09			7,224 83	25,000 00	(17,775 17)
	1000 0000	05/29/07	06/30/09			7,280 16	24,999 89	(17,719.83)
Security Subtotal						14,504.99	49,999.89	(35,495.00)
CITIGROUP CAPITAL XVI	200 0000	11/15/06	03/02/09			1,412 34	5,000 00	(3,587 66)
	100 0000	11/15/06	03/02/09			701 81	2,500 00	(1,798 19)
	700 0000	11/15/06	03/02/09			4,957 20	17,500 00	(12,542 80)
	200 0000	11/15/06	03/02/09			1,418 34	5,000 00	(3,581 66)
	200 0000	11/15/06	03/02/09			1,420 34	4,999 99	(3,579 65)
	100 0000	11/15/06	03/02/09			711 16	2,500 00	(1,788 84)
	7 0000	11/15/06	06/30/09			117 59	175 00	(57 41)
	1493 0000	11/15/06	06/30/09			25,092 18	37,325 01	(12,232 83)
Security Subtotal						35,830.96	75,000.00	(39,169.04)
HERTZ GLOBAL HOLDINGS IN	1700 0000	06/12/07	12/14/09			18,180 19	37,825 00	(19,644 81)
ING GROEP NV	1400 0000	09/16/05	09/02/09			17,887.02	35,000 00	(17,112 98)
	600 0000	09/16/05	09/02/09			7,674 16	14,999 99	(7,325 83)
Security Subtotal						25,561.18	49,999.99	(24,438.81)
LAS VEGAS SANDS CORP	1000 0000	03/13/06	12/14/09			15,576 18	50,250 00	(34,673 82)
MACQUARIE INFRASTRUCTURE	1600 0000	12/15/04	12/14/09			16,079 93	36,183 77	(20,103.84)



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C B BRANCH TTEE

## 2009 TAX REPORTING STATEMENT

### 2009 CAPITAL GAIN AND LOSS TRANSACTIONS

Security Description	Quantity	Date Acquired Cover of Short	Date Liquidated Short Sale	Amortization/Accretion Year-to-Date	Life-to-Date	Sales Price	Cost Basis	Gain or (Loss)
CITIGROUP CAPITAL XVII	300 0000	02/27/07	03/02/09			1,830 57	7,500 00	(5,669 43)
	200 0000	02/27/07	03/02/09			1,225 95	4,999 99	(3,774 04)
	100 0000	02/27/07	03/02/09			613 97	2,500 00	(1,886 03)
	292 0000	02/27/07	03/02/09			1,795 72	7,300 00	(5,504 28)
	300 0000	02/27/07	03/02/09			1,853 92	7,500 00	(5,646 08)
	108 0000	02/27/07	03/02/09			668 49	2,700 00	(2,031 51)
	600 0000	02/27/07	03/02/09			3,719 88	15,000 00	(11,280 12)
	100 0000	02/27/07	03/02/09			623 97	2,500 00	(1,876 03)
	2000 0000	02/27/07	06/30/09			31,425 86	50,000 01	(18,574 15)
		Security Subtotal				43,758.33	100,000.00	(56,241.67)
PPL ENERGY SUPPLY LLC	500 0000	07/13/06	06/30/09			12,173 12	12,500 00	(326 88)
	300 0000	07/13/06	06/30/09			7,232 09	7,500 00	(267 91)
	200 0000	07/13/06	06/30/09			4,823 40	5,000 00	(176 60)
	400 0000	07/13/06	06/30/09			9,650 80	10,000 00	(349 20)
	100 0000	07/13/06	06/30/09			2,414 69	2,500 00	(85 31)
	100 0000	07/13/06	06/30/09			2,415 69	2,500 00	(84 31)
	100 0000	07/13/06	06/30/09			2,417 69	2,500 00	(82 31)
	200 0000	07/13/06	06/30/09			4,859 40	5,000 00	(140 60)
	100 0000	07/13/06	06/30/09			2,436 69	2,500 00	(63 31)
		Security Subtotal				48,423.57	50,000 00	(1,576 43)
ROYAL BK OF SCOT GRP PLC	1000 0000	05/12/05	09/02/09			9,573 10	25,000 00	(15,426 90)
	400 0000	05/12/05	09/02/09			3,835 38	9,999 99	(6,164 61)
	600 0000	05/12/05	09/02/09			5,759 06	15,000 00	(9,240 94)
	1000 0000	05/12/05	12/14/09			10,002 48	25,000 00	(14,997 52)
		Security Subtotal				29,170.02	74,999.99	(45,829 97)
		Long Term Capital Losses Subtotal				247,085.35	524,258.74	(277,173 39)
NET LONG TERM CAPITAL GAIN (LOSS)								(265,097.67)
TOTAL CAPITAL GAINS AND LOSSES						669,715.98	935,558.74	(265,842.76)
TOTAL REPORTABLE GROSS PROCEEDS						669,739.85		
DIFFERENCE						(23.87) *		

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
LAZARD LTD-PASSTHROUGH	375.	0.	375.
MERRILL LYNCH-ACCRETION	21.	0.	21.
MERRILL LYNCH-CAPITAL GAIN	5,773.	5,773.	0.
MERRILL LYNCH-DIVIDENDS	187,208.	0.	187,208.
MERRILL LYNCH-INTEREST	257,885.	0.	257,885.
TOTAL TO FM 990-PF, PART I, LN 4	451,262.	5,773.	445,489.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	7,915.	7,915.		0.
TO FORM 990-PF, PG 1, LN 16B	7,915.	7,915.		0.

FORM 990-PF	TAXES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	1,801.	1,801.		0.
FEDERAL EXCISE TAX	4,938.	4,938.		0.
TO FORM 990-PF, PG 1, LN 18	6,739.	6,739.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CMA ANNUAL FEE	125.	125.		0.
BANK CHARGES	91.	91.		0.
PORTFOLIO DEDUCTIONS	10.	10.		0.
MISCELLANEOUS EXPENSE	1,724.	1,724.		0.
TO FORM 990-PF, PG 1, LN 23	1,950.	1,950.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	5
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MERRILL LYNCH CORPORATE STOCK	2,737,614.	4,367,508.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,737,614.	4,367,508.

FORM 990-PF	CORPORATE BONDS	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MERRILL LYNCH CORPORATE BONDS	4,482,452.	4,902,572.
TOTAL TO FORM 990-PF, PART II, LINE 10C	4,482,452.	4,902,572.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MERRILL LYNCH OTHER INVESTMENTS	COST	1,573,970.	475,594.
LAZARD LTD-PASSTHROUGH	COST	526.	526.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,574,496.	476,120.

FORM 990-PF	OTHER ASSETS		STATEMENT	8
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE	
ESTIMATED ACCRUED INTEREST	10,717.	10,738.	10,738.	
DIVIDENDS RECEIVABLE-MERRILL LYNCH	994.	1,687.	1,687.	
PREPAID FEDERAL EXCISE TAX	817.	0.	0.	
TO FORM 990-PF, PART II, LINE 15	12,528.	12,425.	12,425.	

FORM 990-PF	GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR	STATEMENT	9
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RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
BERNADINE FRANCISCAN SISTERS 450 ST. BERNADINE ST READING, PA 19607	NONE MISSIONARY WORK	PUBLIC	30,000.
BOERNE CHAMPION HIGH SCHOOL 1 GREYHOUND LANE BOERNE, TX 78006	NONE SCHOLARSHIPS	PUBLIC	22,000.
BOERNE PUBLIC LIBRARY FOUNDATION 210 N. MAIN BOERNE, TX 78006	NONE CAPITAL CAMPAIGN	PUBLIC	100,000.
CAL FARLEY'S BOYS RANCH P O BOX 1890 AMARILLO, TX 79105	NONE ABANDONED CHILDREN	PUBLIC	1,000.
CAMP BLODGET P O BOX 214 ADA, MI 49301	NONE GENERAL FUND	PUBLIC	1,000.

C.B. AND ANITA BRANCH TRUST ANITA BRANCH			74-6431994
GATHOLIC CHARITIES 202 W FRENCH PL SAN ANTONIO, TX 78212	NONE HELP FOR HOMELESS	PUBLIC	10,000.
CIBOLO NATURE CENTER P O BOX 9 BOERNE, TX 78006	NONE GENERAL FUND	PUBLIC	10,000.
DAUGHTERS OF MARY HELP OF CHRISTIANS 6019 BUENA VISTA ST SAN ANTONIO, TX 78237	NONE MISSIONARY WORK	PUBLIC	10,000.
DOCTORS WITHOUT BORDERS 333 7TH AVE NEW YORK, NY 10001	NONE MEDICAL ASST TO DISADVANTAGED	PUBLIC	2,000.
FATHER FLANIGAN'S GIRLS & BOYS TOWN OF SA 503 URBAN LOOP SAN ANTONIO, TX 78204	NONE ABANDONED & NEGLECTED CHILDREN	PUBLIC	6,000.
FINCA 1101 14TH ST N.W. WASHINGTON, DC 20005	NONE SMALL LOANS TO VILLAGE BANKS	PUBLIC	5,000.
HEALY-MURPHY CENTER 618 LIVE OAK SAN ANTONIO, TX 78202	NONE H.S. FOR YOUTH IN CRISIS	PUBLIC	4,000.
HISTORICAL CENTER FOUNDATION P O BOX 831078 SAN ANTONIO, TX 78283	NONE MAINTENANCE	PUBLIC	10,000.
MARYKNOLL SISTERS P O BOX 311 MARYKNOLL, NY 20545	NONE MISSIONARY WORK	PUBLIC	25,000.
OUR LADY OF THE HILLS CATHOLIC SCHOOLS 601 PETERSON FARM RD KERRVILLE, TX 78028	NONE CAPITAL CAMPAIGN	PUBLIC	5,000.

RELIGIOUS TEACHERS FILIPPINI 455 WESTERN AVE MORRISTOWN, NJ 09960	NONE MISSIONARY WORK	PUBLIC	50,000.
ROY MASS YOUTH ALTERNATIVES 3103 WEST AVE SAN ANTONIO, TX 78213	NONE ABUSED, ABANDONED CHILDREN	PUBLIC	10,000.
SACRED HEART CENTER 121 LANDMARK AVE EAGLE BUTTE, SD 57625	NONE ABUSED WOMEN	PUBLIC	7,775.
SCHOOL SISTERS OF ST. FRANCIS 1501 S. LAYTON BLVD MILWAUKEE, WI 58215	NONE MISSIONARY WORK	PUBLIC	30,000.
SHINER CATHOLIC SCHOOL 424 LUDMILLA ST SHINER, TX 77984	NONE OPERATING COSTS	PUBLIC	5,000.
SISTERS OF DIVINE PROVIDENCE 515 S.W. 24TH ST SAN ANTONIO, TX 78207	NONE MEDICAL AID	PUBLIC	10,000.
SISTERS OF THE HOLY SPIRIT & MARY IMMACULATE 301 YUCCA ST SAN ANTONIO, TX 78203	NONE MISSIONARY WORK	PUBLIC	35,000.
SISTERS OF THE INCARNATE WORD & BLESSED SACRAMENT 1101 N.E. WATER ST VICTORIA, TX 77901	NONE MISSIONARY WORK	PUBLIC	25,000.
SOCIETY OF ST. VINCENT DE PAUL 828 W. COMMERCE SAN ANTONIO, TX 78207	NONE HELP FOR S.A. POOR	PUBLIC	10,000.
ST. PETER THE APOSTLE 202 KRONKOSKY ST BOERNE, TX 78006	NONE CAPITAL CAMPAIGN	PUBLIC	52,000.



ANIMAL FRIENDS HUMANE SOCIETY 213 W. BORGFELD RD. SAN ANTONIO, TX 78260	NONE PUBLIC ASSISTANCE	PUBLIC	1,000.
HILL COUNTRY PREGNANCY CENTER 101 PINE VIEW DRIVE BOERNE, TX 78006	NONE PUBLIC ASSISTANCE	PUBLIC	5,200.
LAM MINISTRIES P.O. BOX 337574 GREELEY, CO 80633	NONE PUBLIC ASSISTANCE	PUBLIC	5,000.
PROVIDENCE HIGH SCHOOL 1215 N SAINT MARYS STREET SAN ANTONIO, TX 78215	NONE PUBLIC ASSISTANCE	PUBLIC	12,000.
RED CLOUD INDIAN SCHOOL 100 MISSION DRIVE PINE RIDGE, SD 57770	NONE PUBLIC ASSISTANCE	PUBLIC	1,000.
SAMS KIDS STUDENT FOUNDATION 702 SW 8TH, DEPT 8013-0555 BENTONVILLE, AR 72716	NONE PUBLIC ASSISTANCE	PUBLIC	5,000.
SAN ANTONIO FOOD BANK 5200 W OLD US HIGHWAY 90 SAN ANTONIO, TX 78227	NONE PUBLIC ASSISTANCE	PUBLIC	1,000.
ST PETERS CHURCH 651 LINCOLNSHIRE DRIVE SAN ANTONIO, TX 78220	NONE CAPITAL CAMPAIGN	PUBLIC	30,075.
THE CHILDREN'S SHELTER 2939 W. WOODLAWN SAN ANTONIO, TX 78228	NONE PUBLIC ASSISTANCE	PUBLIC	2,000.
ST MARY'S UNIVERSITY ONE CAMINO SANTA MARIA SAN ANTONIO, TX 78228	NONE PUBLIC ASSISTANCE	PUBLIC	5,000.

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

543,050.

**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No 1545-1709

▶ File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits

Type or print  File by the due date for filing your return. See instructions	Name of Exempt Organization <b>C.B. AND ANITA BRANCH TRUST ANITA BRANCH, TRUSTEE</b>	Employer identification number <b>74-6431994</b>
	Number, street, and room or suite no. If a P.O. box, see instructions <b>103 RANGER CREEK ROAD</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions <b>BOERNE, TX 78006-5624</b>	

Check type of return to be filed (file a separate application for each return)

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

**MANGUM, SCHIEFFER, BRADLEY & CO PLLC**

- The books are in the care of ▶ **7373 BROADWAY, SUITE 109 - SAN ANTONIO, TX 78209**

Telephone No ▶ **210-477-8797**

FAX No ▶

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for ☒ calendar year **2009** or ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

- 2 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	<b>3a</b>	\$	<b>0.</b>
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	<b>3b</b>	\$	<b>839.</b>
<b>c</b> <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	<b>3c</b>	\$	<b>0.</b>

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1)

<b>Part II</b>	<b>Additional (Not Automatic) 3-Month Extension of Time.</b> Only file the original (no copies needed)	
Type or print  File by the extended due date for filing the return. See instructions	Name of Exempt Organization <b>C.B. AND ANITA BRANCH TRUST ANITA BRANCH, TRUSTEE</b>	Employer identification number <b>74-6431994</b>
	Number, street, and room or suite no. If a P.O. box, see instructions <b>MANGUM, SCHIEFFER, BRADLEY &amp; CO., PLLC</b>	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions <b>7373 BROADWAY SUITE 109 SAN ANTONIO TX 7</b>	

Check type of return to be filed (File a separate application for each return).

- ☐ Form 990    ☐ Form 990-EZ    ☐ Form 990-T (sec 401(a) or 408(a) trust)    ☐ Form 1041-A    ☐ Form 5227    ☐ Form 8870  
☐ Form 990-BL    ☒ Form 990-PF    ☐ Form 990-T (trust other than above)    ☐ Form 4720    ☐ Form 6069

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

**MANGUM, SCHIEFFER, BRADLEY & CO PLLC**

- The books are in the care of ☒ **7373 BROADWAY, SUITE 109 - SAN ANTONIO, TX 78209**

Telephone No. **210-477-8797**

FAX No. ☐

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2010**

5 For calendar year **2009**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension

**ADDITIONAL TIME IS NEEDED TO OBTAIN INFORMATION FROM THIRD PARTY IN ORDER TO COMPLETE THE RETURN.**

<b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	<b>8a</b>	\$	<b>0.</b>
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	<b>8b</b>	\$	<b>839.</b>
<b>c Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	<b>8c</b>	\$	<b>0.</b>

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **Sandra Schieffer** Title **CPA**

Date **8/13/10**

Form **8868** (Rev. 4-2009)