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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 01-01-2009 , and ending 12-31-2009

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 Tucker Foundation		A Employer identification number 75-6014646	
	Number and street (or P O box number if mail is not delivered to street address) PO Box 600667		Room/suite	B Telephone number (see page 10 of the instructions) (214) 526-7268
	City or town, state, and ZIP code Dallas, TX 753600667		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"/>	
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			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"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 518,525		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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 <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments	17	17	17	
	4 Dividends and interest from securities. . . . .	8,944	8,944	8,944	
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-7,838			
	b Gross sales price for all assets on line 6a _____ 134,165				
	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 . . . . .				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .	36,564	36,564	36,564	
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	37,687	45,525	45,525	
	13 Compensation of officers, directors, trustees, etc	0	0	0	0
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .	2,010	2,010	2,010	0
	c Other professional fees (attach schedule) . . . . .	3,568	3,568	3,568	0
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see page 14 of the instructions)	6,227	1,793	1,793	0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	10,494	10,494	10,494	0
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	22,299	17,865	17,865	0
	25 Contributions, gifts, grants paid . . . . .	30,500			30,500
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	52,799	17,865	17,865	30,500
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-15,112			
	b <b>Net investment income</b> (if negative, enter -0-)		27,660		
	c <b>Adjusted net income</b> (if negative, enter -0-)			27,660	

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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing . . . . .			
	2	Savings and temporary cash investments . . . . .	145,074	107,472	107,472
	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 15 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 . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .	305,467 	302,672	342,017
	c	Investments—corporate bonds (attach schedule). . . . .			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .	64,263 	89,548	69,036
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	514,804	499,692	518,525
	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) . . . . .			
Net Assets or Fund Balances	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22) . . . . .	0	0	
		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds . . . . .	211,421	211,421	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	303,383	288,271	
	30	Total net assets or fund balances (see page 17 of the instructions) . . . . .	514,804	499,692	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	514,804	499,692	

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	514,804
2	Enter amount from Part I, line 27a . . . . .	2	-15,112
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3 . . . . .	4	499,692
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	499,692

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 Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
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	-7,838
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	-7,819

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	40,000	645,434	0 061974
2007	51,708	550,800	0 093878
2006	37,000	500,124	0 073982
2005	34,117	413,535	0 082501
2004	39,109	356,902	0 109579

2	Total of line 1, column (d). . . . .	2	0 421914
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 084383
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5. . . . .	4	446,092
5	Multiply line 4 by line 3. . . . .	5	37,643
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	277
7	Add lines 5 and 6. . . . .	7	37,920
8	Enter qualifying distributions from Part XII, line 4. . . . . 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	8	30,500

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

1aExempt 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)				
bDomestic 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	553
cAll other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0
3Add lines 1 and 2. . . . .			3	553
4Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	0
5Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .			5	553
6Credits/Payments				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	2,560	
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		
7Total credits and payments Add lines 6a through 6d. . . . .			7	2,560
8Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached			8	6
9Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .			9	
10Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. . . . .			10	2,001
11Enter the amount of line 10 to be Credited to 2010 estimated tax 2,001 Refunded			11	0

Part VII-AStatements Regarding Activities

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? . . . . .		Yes	No
		1a		No
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)? . . . . . <i>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.</i>	1b		No
c	Did the foundation file Form 1120-POL for this year? . . . . .	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0 (2) On foundation managers \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities.</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	4a	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year? . . . . .	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
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	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) 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? <i>If "No," attach explanation .</i>	8b	Yes	
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)? <i>If "Yes," complete Part XIV</i> . . . . .	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10		No

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 page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of PEBBLE FRY Telephone no (214) 526-7268 Located at 4809 COLE AVENUE SUITE 340 DALLAS TX ZIP+4 75225			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.			
		15		

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. Yes No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ). Yes No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here.	1b		
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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?. If "Yes," list the years 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions ).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20____, 20____, 20____, 20____			
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		No
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		No

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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)? Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>		5b
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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>			6b No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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
M ROBERT BLAKENEY 4809 COLE AVENUE SUITE 340 DALLAS, TX 75205	TRUSTEE 0 00	0	0	0
FRED E TUCKER III 4809 COLE AVENUE SUITE 340 DALLAS, TX 75205	TRUSTEE 0 00	0	0	0
BETTY B TUCKER 4809 COLE AVENUE SUITE 340 DALLAS, TX 75205	TRUSTEE 0 00	0	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
NONE				
Total number of other employees paid over \$50,000.				0

## Part VIII Information About Officers and Contractors (continued)

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

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

<b>Total</b> number of others receiving over \$50,000 for professional services. . . . .	0
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## 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		
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
--	--------

<b>1</b> N/A	0
<b>2</b>	
All other program-related investments See page 24 of the instructions	
<b>3</b>	

<b>Total.</b> Add lines 1 through 3.	0
--------------------------------------	---



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	301,317
b	Average of monthly cash balances. . . . .	1b	151,568
c	Fair market value of all other assets (see page 24 of the instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	452,885
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	452,885
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions). . . . .	4	6,793
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	446,092
6	Minimum investment return. Enter 5% of line 5. . . . .	6	22,305

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	22,305
2a	Tax on investment income for 2009 from Part VI, line 5. . . . .	2a	553
b	Income tax for 2009 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	553
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	21,752
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	21,752
6	Deduction from distributable amount (see page 25 of the instructions). . . . .	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	21,752

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	30,500
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	30,500
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions). . . . .	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	30,500
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				21,752
2 Undistributed income, if any, as of the end of 2008				
a Enter amount for 2008 only. . . . .			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2009				
a From 2004. . . . .				22,046
b From 2005. . . . .				14,206
c From 2006. . . . .				13,064
d From 2007. . . . .				25,752
e From 2008. . . . .				10,692
f Total of lines 3a through e. . . . .	85,760			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 30,500				
a Applied to 2008, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d Applied to 2009 distributable amount. . . . .				21,752
e Remaining amount distributed out of corpus	8,748			
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	94,508			
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 page 27 of the instructions. . .		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions. . . . .			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) (see page 27 of the instructions). . . . .	0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions). . . . .	22,046			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a. . . . .	72,462			
10 Analysis of line 9				
a Excess from 2005. . . .				14,206
b Excess from 2006. . . .				13,064
c Excess from 2007. . . .				25,752
d Excess from 2008. . . .				10,692
e Excess from 2009. . . .				8,748

Part XIV

Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years			(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	
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 organization had \$5,000 or more in assets at any time during the year—see page 27 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) )

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

2

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a

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

MS PEBBLE FRY  
PO BOX 600667  
DALLAS, TX 753600667  
(214) 526-7268

b

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

APPLICATIONS SHOULD BE WRITTEN OR TYPED WHEN SUBMITTED, THE APPLICATION SHOULD PROVIDE AS MUCH DETAILED INFORMATION AS POSSIBLE DESCRIBING THE CHARITABLE FUNCTION AND BENEFITS PROVIDED BY THE APPLICANT THE NAME, ADDRESS, AND TELEPHONE NUMBER OF THE APPLICANT SHOULD BE PROVIDED, ALONG WITH A CONTACT PERSON FAMILIAR WITH THE ORGANIZATION'S CHARITABLE FUNCTIONS

c

Any submission deadlines

APPLICATIONS FOR THE CURRENT CALENDAR YEAR MUST BE SUBMITTED PRIOR TO OCTOBER 31 OF EACH YEAR THE T

d

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

GRANTS ARE NORMALLY LIMITED TO LOCAL AREA CHARITABLE ORGANIZATIONS ON A RECURRING BASIS GRANTS ARE USUALLY IN THE \$500 - \$3,000 RANGE

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			▶ 3a	30,500
b Approved for future payment				
Total . . . . .			▶ 3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2009)

## Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

<b>1</b>	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?		<b>Yes</b>	<b>No</b>
<b>a</b>	Transfers from the reporting foundation to a noncharitable exempt organization of			
	<b>(1)</b> Cash. . . . .	<b>1a(1)</b>		<b>No</b>
	<b>(2)</b> Other assets. . . . .	<b>1a(2)</b>		<b>No</b>
<b>b</b>	Other transactions			
	<b>(1)</b> Sales of assets to a noncharitable exempt organization. . . . .	<b>1b(1)</b>		<b>No</b>
	<b>(2)</b> Purchases of assets from a noncharitable exempt organization. . . . .	<b>1b(2)</b>		<b>No</b>
	<b>(3)</b> Rental of facilities, equipment, or other assets. . . . .	<b>1b(3)</b>		<b>No</b>
	<b>(4)</b> Reimbursement arrangements. . . . .	<b>1b(4)</b>		<b>No</b>
	<b>(5)</b> Loans or loan guarantees. . . . .	<b>1b(5)</b>		<b>No</b>
	<b>(6)</b> Performance of services or membership or fundraising solicitations. . . . .	<b>1b(6)</b>		<b>No</b>
<b>c</b>	Sharing of facilities, equipment, mailing lists, other assets, or paid employees. . . . .	<b>1c</b>		<b>No</b>
<b>d</b>	If the answer to any of the above is "Yes," complete the following schedule. Column <b>(b)</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 <b>(d)</b> the value of the goods, other assets, or services received.			

[illegible]

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

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

<p>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</p>				
<p>*****</p>		<p>2010-11-15</p>		<p>*****</p>
<p>Signature of officer or trustee</p>		<p>Date</p>		<p>Title</p>
<p><b>Paid Preparer's Use Only</b></p>	<p>Preparer's Signature ▶ Paul D Knutson</p>		<p>Date</p>	<p>Check if self-employed <input checked="" type="checkbox"/></p>
	<p>Firm's name (or yours if self-employed), address, and ZIP code ▶</p>		<p>HOWARD &amp; CO LLP</p>	<p>Preparer's identifying number (see <b>Signature</b> on page 30 of the instructions)</p>
	<p>8350 MEADOW ROAD SUITE 286</p>		<p>DALLAS, TX 75231</p>	<p>EIN ▶</p>
				<p>Phone no (214) 346-0750</p>

Additional Data

Software ID: 09000028  
Software Version: 2009.04050  
EIN: 75-6014646  
Name: Tucker Foundation

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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 )
Noble Corp (300 shs)		2008-01-28	2009-02-18
National O il Well Varco (800 shs)		2004-11-24	2009-02-18
Nabors Industries (400 shs)		2008-04-29	2009-02-18
Johnson & Johnson (300 shs)		2002-12-10	2009-02-27
General Electric (500 shs)		2004-10-04	2009-03-03
Boardwalk Pipeline Partners LP (1,200 shs)		2009-05-13	2009-09-15
Anadarko Petroleum (300 shs)		2006-01-05	2009-10-07
Encore Acquisition Company (800 shs)		2006-04-18	2009-11-02

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h


(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)
7,205		13,593	-6,388
20,452		14,273	6,179
3,880		15,057	-11,177
15,245		16,692	-1,447
3,502		17,065	-13,563
28,455		25,097	3,358
19,197		14,411	4,786
36,229		25,815	10,414




Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-6,388
			6,179
			-11,177
			-1,447
			-13,563
			3,358
			4,786
			10,414

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
athena foundation11203 bushire drive dallas, TX 75229	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
baylor health care system foundation 3500 gaston avenue dallas, TX 75246	nONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
CAMP GRADY SPRUCE YMCA of Metro Dallas601 north akard Dallas, TX 75201	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	500
Center for Brain Health The University of Texas at DallasUT-DALLAS CALLIER 1966 INWOOD ROAD DALLAS, TX 75235	none	various	furTHERANCE OF CHARITABLE PURPOSES	1,000
CHILDREN'S MEDICAL CENTER DEVELOPMENT DEPARTMENT2777 STEMMONS SUITE 1452 DALLAS, TX 75207	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	500
COLLIN COUNTY ADULT CLINIC 100 W 15TH STREET SUITE 210 PLANO, TX 75075	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
DEAF ACTION CENTER3115 CRESTVIEW DALLAS, TX 75235	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	3,000
dfW CHAPLAINCYpo box 610445 dfw airport, TX 75261	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	500
eIISA PROJECT3102 Oak Lawn Suite 520 Dallas, TX 75219	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
highLAND PARK PRESBYTERIAN 3821 UNIVERSITY BLVD dallas, TX 75205	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
HILLIER SCHOOL - HPPC3821 UNIVERSITY BLVD DALLAS, TX 75205	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,500
HP Byron Nelson Championship2708 FAIRMOUNT STE 201 Dallas, TX 75201	NONE	vARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
James Bowie Elementary3700 Ross Avenue Dallas, TX 75204	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	500
MEALS ON WHEELS1440 W MOCKINGBIRD LANE STE 500 DALLAS, TX 752474929	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	2,000
Mercy Street3801 Holystone Dallas, TX 75212	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	2,000
<b>Total . . . . .</b>  <b>3a</b>				30,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
MINERAL COUNTY HEALTH COUNCILPO BOX 425 CREeDE,CO 81130	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	2,000
MINISTERIO DE FE INCPO Box 756 McAllen,TX 78505	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
PASTORAL COUNSELING CENTER 4525 LEMMON AVE STE 200 DALLAS,TX 75219	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	500
PRESBYTERIAN HEALTHCARE FDTN 8440 WALNUT HILL LN STE 800 LB6 DALLAS,TX 75231	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
Salesmanship Club of Dallas4005 ZANG BLVD 700 DALLAS,TX 75208	none	various	furtherANCE OF CHARITABLE PURPOSES	1,000
SALVATION ARMYP O BOX 36006 DALLAS,TX 75235	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
SCHREINER UNIVERSITY KERRVILLE KERRVILLE,TX 78028	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
ST MARK CATHOLIC CHURCH1201 ALMA DRIVE PLANO,TX 75075	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
The Diocese of Ahmedabad3769 Weeburn Dallas,TX 75229	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	500
The Venegas Medical Foundation2301 S Hampton Rd Ste 150 Dallas,TX 75224	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	2,000
US CENTER FOR WORLD MISSION PO BOX 3586 FAYETTEVILLE,AR 72702	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	1,000
WEST DALLAS COMMUNITY SCHOOL9149 RAEFORD DALLAS,TX 75243	NONE	VARIOUS	FURTHERANCE OF CHARITABLE PURPOSES	500
ymca OF METROPOLITAN DALLAS 2708 FAIRMOUNT STE 201 DALLAS,TX 75201	nONE	vARIOUS	fURTHERANCE OF CHARITABLE PURPOSES	500
<b>Total . . . . .</b>  <b>3a</b>				30,500

TY 2009 Accounting Fees Schedule

**Name:** Tucker Foundation

**EIN:** 75-6014646

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Howard & Co , LLP	2,010	2,010	2,010	0

## TY 2009 Investments Corporate Stock Schedule

**Name:** Tucker Foundation

**EIN:** 75-6014646

Name of Stock	End of Year Book Value	End of Year Fair Market Value
400 SHS CHEVRON CORP	14,857	30,804
400 SHS PEPSICO INCORPORATED	19,653	24,312
300 SHS PROCTOR & GAMBLE	16,070	18,186
300 SHS JOHNSON & JOHNSON	0	0
400 SHS NATIONAL OIL WELL	0	0
500 SHS GENERAL ELECTRIC	0	0
300 SHS ANADARKO PETROLEUM	0	0
300 SHS DEVON ENERGY CORP	22,183	22,059
800 SHS ENCORE ACQUISITION COMPANY	0	0
400 SHS COCA COLA CORP	20,732	22,800
500 SHS ENCANA CORP	12,627	16,210
200 SHS Diamond Offshore Drilling	20,949	19,690
300 shs Hewlett Packard	14,468	15,447
300 shs Spdr Gold Trust	19,759	32,193
400 shs Nabors Industries	0	0
300 shs Noble Corp	0	0
120 shs Transocean	15,375	9,940
1,000 SHS BRISTOL-MYERS SQUIBB	25,538	25,260
500 SHS CENOVUS	11,891	12,625
1,000 SHS STATOILHYDRO (ADR)	23,293	24,900
100 SHS APPLE COMPUTER	20,150	21,025
400 SHS QUALCOMM	18,380	18,516
1,000 SHS AT&T INC	26,747	28,050

## TY 2009 Investments - Other Schedule

**Name:** Tucker Foundation

**EIN:** 75-6014646

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MINERAL INTERESTS	AT COST	134	134
700 SHS SAN JUAN BASIN ROYALTY TRUST	AT COST	15,822	12,068
700 SHS PENN WEST ENERGY TRUST	AT COST	20,913	12,334
1,000 SHS HUGOTON ROYALTY TRUST	AT COST	27,304	16,070
1,000 SHS CANADIAN OIL SANDS TRUST	AT COST	25,375	28,430

# TY 2009 Other Expenses Schedule

**Name:** Tucker Foundation

**EIN:** 75-6014646

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursement s for Charit able Purposes
office expense	9,035	9,035	9,035	0
Lease operating expenses	1,459	1,459	1,459	0

**TY 2009 Other Income Schedule****Name:** Tucker Foundation**EIN:** 75-6014646

Description	Revenue And Expenses Per Books	Net Invest ment Income	Adjusted Net Income
OIL & GAS ROYALTIES	35,126	35,126	35,126
OIL & GAS WORKING INTEREST, NET	1,438	1,438	1,438



TY 2009 Other Professional Fees Schedule

**Name:** Tucker Foundation

**EIN:** 75-6014646

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SLAYDEN, DIEHL & CO	3,568	3,568	3,568	0

TY 2009 Taxes Schedule

**Name:** Tucker Foundation

**EIN:** 75-6014646

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX	327	327	327	0
STATE INCOME TAX WITHHELD	1,466	1,466	1,466	0
Excise taxes	4,434	0	0	0