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INTERNAL REVENUE SERVICE

Return of Private Foundation

OMB No 1545-0052

Form **990-PF**

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

2009

For calendar year 2009, or tax year beginning 04/01, 2009, and ending 03/31, 2010

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 SUMMERFIELD G ROBERTS FOUNDATION (30-01-100-3086055)	A Employer identification number 75-2341916
Number and street (or P.O. box number if mail is not delivered to street address) Room/suite BANK OF AMERICA, N.A. P.O. BOX 831041	B Telephone number (see page 10 of the instructions) (800) 357-7094
City or town, state, and ZIP code DALLAS, TX 75283-1041	C If exemption application is pending check here ☐ D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization. ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$ 6,884,341.** J Accounting method: ☒ Cash ☐ Accrual
Other (specify) _____
(Part I, column (d) must be on cash basis)

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch. B.				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	141,630.	141,630.		STMT 1
	5a Gross rents				
	b Net rental income (or loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-454,413.			
	b Gross sales price for all assets on line 6a	1,953,001.			
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
Operating and Administrative Expenses	9 Income modifications				
	10 a Gross sales less returns and allowances				
	b Less Cost of Goods Sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	54,560.	49,419.		STMT 2
	12 Total. Add lines 1 through 11.	-258,223.	191,049.		
	13 Compensation of officers, directors, trustees, etc.	82,769.	37,892.		44,877.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 3	3,500.	NONE	NONE	3,500.
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	1,746.	1,746.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	14,400.			14,400.
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) STMT 4	6,855.	6,855.		
	24 Total operating and administrative expenses. Add lines 13 through 23	109,270.	46,493.	NONE	62,777.
	25 Contributions, gifts, grants paid	250,164.			250,164.
	26 Total expenses and disbursements. Add lines 24 and 25	359,434.	46,493.	NONE	312,941.
	27 Subtract line 26 from line 12	-617,657.			
	a Excess of revenue over expenses and disbursements				
	b Net investment income (if negative, enter -0-)		144,556.		
	c Adjusted net income (if negative, enter -0-)				

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	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	720,971.	281,725.	281,725.	
	3	Accounts receivable ▶				
		Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)				
	7	Other notes and loans receivable (attach schedule) ▶				
		Less allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10 a	Investments - U S and state government obligations (attach schedule)				
	b	Investments - corporate stock (attach schedule)				
	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) STMT 6	6,964,935.	6,786,521.	6,356,721.		
14	Land, buildings, and equipment basis					
	Less accumulated depreciation (attach schedule) ▶					
15	Other assets (describe ▶ STMT 7)	150,591.	150,591.	245,895.		
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	7,836,497.	7,218,837.	6,884,341.		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 ▶ ☒					
	27	Capital stock, trust principal, or current funds	7,836,497.	7,218,837.		
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances (see page 17 of the instructions)	7,836,497.	7,218,837.		
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	7,836,497.	7,218,837.		

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	7,836,497.
2	Enter amount from Part I, line 27a	2	-617,657.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	7,218,840.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	3.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	7,218,837.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)			(b) How acquired P Purchase D Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a SEE PART IV DETAIL					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)			2	-454,413.	
If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7					
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)			3		
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.					

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.

(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	402,281.	6,364,070.	0.06321127832
2007	385,503.	8,342,578.	0.04620909748
2006	367,687.	7,870,763.	0.04671554715
2005	352,142.	7,500,489.	0.04694920558
2004	330,727.	7,083,150.	0.04669207909
2 Total of line 1, column (d)			2 0.24977720762
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 0.04995544152
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 6,777,454.
5 Multiply line 4 by line 3			5 338,571.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,446.
7 Add lines 5 and 6			7 340,017.
8 Enter qualifying distributions from Part XII, line 4			8 312,941.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of ruling letter if necessary - see instructions)		1	2,891.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3 Add lines 1 and 2		3	2,891.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	NONE
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2,891.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 3,960.		
b Exempt foreign organizations-tax withheld at source	6b NONE		
c Tax paid with application for extension of time to file (Form 8868)	6c NONE		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d		7	3,960.
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	1,069.
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	1,069. Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 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 \$ (2) On foundation managers \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		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 page 19 of the instructions) STMT 9		
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 on page 27)? 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

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		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 <u>N/A</u>				
14	The books are in care of <u>BANK OF AMERICA, N.A.</u> Telephone no <u>(214) 209-1965</u>			
Located at <u>901 MAIN ST, FL 19, DALLAS, TX</u> ZIP + 4 <u>75202-3714</u>				
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)?		X
Organizations relying on a current notice regarding disaster assistance check here		☐
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ Yes	☒ No
If "Yes," list the years		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see page 20 of the instructions)		X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes	☒ No
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No

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

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

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ **6b** ☒

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ **7b**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions)**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		82,769.	-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		NONE	NONE	NONE

Total number of other employees paid over \$50,000 ☐ **NONE**

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

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

Total number of others receiving over \$50,000 for professional services **NONE****Part IX-A Summary of Direct Charitable Activities**

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

Expenses

1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

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

Amount

1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3 NONE	

Total. Add lines 1 through 3

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	6,189,040.
b	Average of monthly cash balances	1b	NONE
c	Fair market value of all other assets (see page 24 of the instructions)	1c	691,624.
d	Total (add lines 1a, b, and c)	1d	6,880,664.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	6,880,664.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	103,210.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,777,454.
6	Minimum investment return. Enter 5% of line 5	6	338,873.

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	338,873.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,891.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2,891.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	335,982.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	335,982.
6	Deduction from distributable amount (see page 25 of the instructions)	6	NONE
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	335,982.

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	312,941.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	312,941.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	N/A
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	312,941.

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				335,982.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			250,092.	
b Total for prior years 20 <u>07</u> , 20 <u> </u> , 20 <u> </u>		NONE		
3 Excess distributions carryover, if any, to 2009				
a From 2004	NONE			
b From 2005	NONE			
c From 2006	NONE			
d From 2007	NONE			
e From 2008	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ <u>312,941.</u>				
a Applied to 2008, but not more than line 2a			250,092.	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		NONE		
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)	NONE			
d Applied to 2009 distributable amount				62,849.
e Remaining amount distributed out of corpus	NONE			
5 Excess distributions carryover applied to 2009 . (If an amount appears in column (d), the same amount must be shown in column (a))	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	NONE			
b Prior years' undistributed income Subtract line 4b from line 2b		NONE		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		NONE		
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions		NONE		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010.				273,133.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	NONE			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	NONE			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	NONE			
10 Analysis of line 9				
a Excess from 2005	NONE			
b Excess from 2006	NONE			
c Excess from 2007	NONE			
d Excess from 2008	NONE			
e Excess from 2009	NONE			

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

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

b Check box to indicate whether the foundation is a private operating foundation described in section

4942(j)(3) or

4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b Endowment alternative test: enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c Support alternative test enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)) or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 of the instructions.)**1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2))

NONE

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

NONE

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

Check here ☐ 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.

SEE STATEMENT 11

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

SEE ATTACHED STATEMENT FOR LINE 2

c Any submission deadlines:

SEE ATTACHED STATEMENT FOR LINE 2

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

SEE ATTACHED STATEMENT FOR LINE 2

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 STATEMENT 15				
Total				3a 250,164.
b Approved for future payment				
Total				3b

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
		14	141,630.	
		18	-454,413.	
		1	5,141.	
		15	49,419.	
			-258,223.	
			-258,223.	-258,223.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions)

[illegible]

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

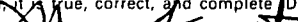
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash			X
(2) Other assets			X
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization			X
(2) Purchases of assets from a noncharitable exempt organization			X
(3) Rental of facilities, equipment, or other assets			X
(4) Reimbursement arrangements			X
(5) Loans or loan guarantees			X
(6) Performance of services or membership or fundraising solicitations			X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees		1c	X
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.			
	 Signature of officer or trustee		BANK OF AMERICA, N.A. Date	
Paid Preparer's Use Only	Preparer's signature 		Date 8-4-10	Check if self-employed ☐
	Firm's name (or yours if self-employed), address, and ZIP code			Title TRUSTEE
			EIN	Preparer's identifying number (See Signature on page 30 of the instructions) Phone no

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
2,569.00		237.855 COLUMBIA LARGE CAP VALUE FUND CL PROPERTY TYPE: SECURITIES 4,446.00				P	02/12/1998 -1,877.00	03/23/2010
38,963.00		3607.666 COLUMBIA LARGE CAP VALUE FUND C PROPERTY TYPE: SECURITIES 64,000.00				P	12/09/1998 -25,037.00	03/23/2010
61,820.00		5724.098 COLUMBIA LARGE CAP VALUE FUND C PROPERTY TYPE: SECURITIES 100,000.00				P	12/29/1997 -38,180.00	03/23/2010
33,572.00		3108.48 COLUMBIA LARGE CAP VALUE FUND CL PROPERTY TYPE: SECURITIES 53,179.00				P	11/30/1996 -19,607.00	03/23/2010
52,017.00		4816.376 COLUMBIA LARGE CAP VALUE FUND C PROPERTY TYPE: SECURITIES 80,000.00				P	11/23/1999 -27,983.00	03/23/2010
40,788.00		3776.658 COLUMBIA LARGE CAP VALUE FUND C PROPERTY TYPE: SECURITIES 60,730.00				P	09/30/1996 -19,942.00	03/23/2010
22,486.00		2082.004 COLUMBIA LARGE CAP VALUE FUND C PROPERTY TYPE: SECURITIES 33,197.00				P	12/31/1995 -10,711.00	03/23/2010
34,148.00		3161.896 COLUMBIA LARGE CAP VALUE FUND C PROPERTY TYPE: SECURITIES 46,764.00				P	04/04/2006 -12,616.00	03/23/2010
34,199.00		3166.583 COLUMBIA LARGE CAP VALUE FUND C PROPERTY TYPE: SECURITIES 46,031.00				P	02/28/1994 -11,832.00	03/23/2010
43,439.00		4022.088 COLUMBIA LARGE CAP VALUE FUND C PROPERTY TYPE: SECURITIES 58,182.00				P	01/01/1992 -14,743.00	03/23/2010
27,994.00		1533.06 COLUMBIA MARSICO GROWTH FUND CLA PROPERTY TYPE: SECURITIES 41,266.00				P	02/12/1998 -13,272.00	03/23/2010

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

Kind of Property		Description				Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis	Gain or (loss)	
12,952.00		709.293 COLUMBIA MARSICO GROWTH FUND CL PROPERTY TYPE: SECURITIES 19,000.00				02/17/1998 -6,048.00	03/23/2010
48,398.00		2650.516 COLUMBIA MARSICO GROWTH FUND CL PROPERTY TYPE: SECURITIES 71,000.00				02/17/1998 -22,602.00	03/23/2010
162,048.00		8874.497 COLUMBIA MARSICO GROWTH FUND CL PROPERTY TYPE: SECURITIES 220,000.00				05/12/1998 -57,952.00	03/23/2010
41,464.00		2270.751 COLUMBIA MARSICO GROWTH FUND CL PROPERTY TYPE: SECURITIES 55,101.00				11/30/1996 -13,637.00	03/23/2010
75,578.00		4138.968 COLUMBIA MARSICO GROWTH FUND CL PROPERTY TYPE: SECURITIES 100,000.00				12/29/1997 -24,422.00	03/23/2010
84,270.00		4614.986 COLUMBIA MARSICO GROWTH FUND CL PROPERTY TYPE: SECURITIES 111,000.00				12/09/1998 -26,730.00	03/23/2010
50,349.00		2757.341 COLUMBIA MARSICO GROWTH FUND CL PROPERTY TYPE: SECURITIES 64,143.00				09/30/1996 -13,794.00	03/23/2010
28,136.00		1540.867 COLUMBIA MARSICO GROWTH FUND CL PROPERTY TYPE: SECURITIES 35,611.00				12/31/1995 -7,475.00	03/23/2010
50,812.00		2782.667 COLUMBIA MARSICO GROWTH FUND CL PROPERTY TYPE: SECURITIES 63,643.00				01/01/1992 -12,831.00	03/23/2010
80,570.00		8163.16 COLUMBIA TOTAL RETURN BOND FUND PROPERTY TYPE: SECURITIES 83,494.00				11/01/1991 -2,924.00	03/23/2010
227,973.00		23097.609 COLUMBIA TOTAL RETURN BOND FUN PROPERTY TYPE: SECURITIES 235,974.00				10/01/1991 -8,001.00	03/23/2010

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
296,456.00		30036.09 COLUMBIA TOTAL RETURN BOND FUND PROPERTY TYPE: SECURITIES 306,068.00				P	03/19/2004 -9,612.00	03/23/2010
69,000.00		8723.135 COLUMBIA HIGH INCOME FUND CLASS PROPERTY TYPE: SECURITIES 86,272.00				P	03/19/2004 -17,272.00	03/23/2010
66,508.00		4647.637 COLUMBIA INTERNATIONAL VALUE FU PROPERTY TYPE: SECURITIES 79,056.00				P	05/29/2002 -12,548.00	03/23/2010
13,492.00		942.859 COLUMBIA INTERNATIONAL VALUE FUN PROPERTY TYPE: SECURITIES 15,727.00				P	05/14/2002 -2,235.00	03/23/2010
47,000.00		4347.826 COLUMBIA MARSICO INT'L OPPORTUN PROPERTY TYPE: SECURITIES 66,043.00				P	04/04/2006 -19,043.00	03/23/2010
141,000.00		13823.529 COLUMBIA MID CAP INDEX FUND CL PROPERTY TYPE: SECURITIES 138,650.00				P	03/19/2004 2,350.00	03/23/2010
41,658.00		2703.296 COLUMBIA SMALL CAP INDEX FUND C PROPERTY TYPE: SECURITIES 47,010.00				P	03/19/2004 -5,352.00	03/23/2010
23,342.00		1514.744 COLUMBIA SMALL CAP INDEX FUND C PROPERTY TYPE: SECURITIES 21,827.00				P	07/25/2003 1,515.00	03/23/2010
TOTAL GAIN(LOSS)							-454,413. =====	

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

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
BOFA CASH RESERVES TRUST CLASS - FORMERL	1.	1.
REINECKE UNIT TR #15 7-011832 160AC, J C	77.	77.
BATSON TITUS CO, TX: 82.5AC JONES SUR. 3	-1.	-1.
COLUMBIA LARGE CAP VALUE FUND CLASS Z SH	11,095.	11,095.
COLUMBIA MARSICO GROWTH FUND CLASS Z SHA	11,597.	11,597.
COLUMBIA TOTAL RETURN BOND FUND CLASS Z	79,791.	79,791.
COLUMBIA HIGH INCOME FUND CLASS Z SHARES	14,188.	14,188.
COLUMBIA INTERNATIONAL VALUE FUND CLASS	4,827.	4,827.
COLUMBIA MARSICO INT'L OPPORTUNITIES FD	12,548.	12,548.
COLUMBIA MID CAP INDEX FUND CLASS Z SHAR	4,401.	4,401.
COLUMBIA SMALL CAP INDEX FUND CLASS Z SH	1,507.	1,507.
COLUMBIA CASH RESERVES TRUST CLASS	1,190.	1,190.
NATIXIS FDS TR IV AEW REAL ESTATE FD CL	409.	409.
	-----	-----
TOTAL	141,630.	141,630.
	=====	=====

FORM 990PF, PART I - OTHER INCOME
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
EXCISE TAX REFUND	5,141.	
ROYALTY INCOME	49,419.	49,419.
	-----	-----
TOTALS	54,560.	49,419.
	=====	=====

FORM 990PF, PART I - ACCOUNTING FEES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
TAX PREPARATION FEE	3,500.			3,500.
TOTALS	3,500.	NONE	NONE	3,500.
	=====	=====	=====	=====

FORM 990PF, PART I - TAXES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FOREIGN TAXES ON QUALIFIED FOR	1,327.	1,327.
FOREIGN TAXES ON NONQUALIFIED	419.	419.
	-----	-----
TOTALS	1,746.	1,746.
	=====	=====

FORM 990PF, PART I - OTHER EXPENSES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
ROYALTY EXPENSES -		
PRODUCTION TAXES	1,826.	1,826.
AD VALOREM TAXES	2,326.	2,326.
LEASE OPERATING	1,525.	1,525.
PROF FEES - AV TAX	906.	906.
STATE TAX W/H	272.	272.
	-----	-----
TOTALS	6,855.	6,855.
	=====	=====

SUMMERFIELD G ROBERTS FOUNDATION

75-2341916

FORM 990PF, PART II - OTHER INVESTMENTS

=====

COST/

FMV

C OR F

ENDING

FMV

ENDING

BOOK VALUE

ARTIO GLOBAL HIGH INCOME FD	C	70,000.	69,933.
COLUMBIA TOTAL RETURN BD FD	C	1,141,881.	1,118,761.
COLUMBIA HIGH INCOME FUND	C	164,606.	131,319.
PIMCO TOTAL RETURN FUND	C	406,000.	405,633.
PIMCO COMMODITY STRATEGY FD	C	116,000.	116,149.
ROWE T PRICE INTL FDS	C	35,000.	34,749.
COLUMBIA ACORN FUND	C	99,000.	98,295.
COLUMBIA ACORN INTL FD	C	35,000.	35,010.
COLUMBIA LARGE CAP VALUE FD	C	936,474.	732,177.
COLUMBIA MARSICO GROWTH FD	C	1,321,704.	1,187,739.
COLUMBIA INTL VALUE FD	C	184,273.	158,311.
COLUMBIA MARSICO INTL OPP FD	C	420,613.	377,222.
COLUMBIA MID CAP INDEX FD	C	259,797.	290,130.
COLUMBIA SMALL CAP INDEX FD	C	128,173.	134,310.
COLUMBIA SMALL CAP VALUE FD	C	64,000.	62,958.
COLUMBIA SMALL CAP GROWTH FD	C	35,000.	34,519.
EATON VANCE LARGE CAP VALUE FD	C	458,000.	458,518.
HARBOR INTL FD	C	93,000.	93,321.
LAZARD FUNDS INC	C	162,000.	165,554.
OLD MUTUAL MID AP VALUE	C	99,000.	97,644.
NATIXIS FDS TR IV	C	70,000.	68,980.
COLUMBIA SELECT SMALL CAP FD	C	29,000.	28,348.
COLUMBIA SELECT LARGE CAP GROW	C	458,000.	457,141.

TOTALS

-----	-----
6,786,521.	6,356,721.
=====	=====

SUMMERFIELD G ROBERTS FOUNDATION

75-2341916

FORM 990PF, PART II - OTHER ASSETS

=====

DESCRIPTION -----	BEGINNING BOOK VALUE -----	ENDING BOOK VALUE -----	ENDING FMV ---
OIL & GAS ROYALTY INTERESTS	150,591. -----	150,591. -----	245,895. -----
TOTALS	150,591. =====	150,591. =====	245,895. =====

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

DESCRIPTION -----	AMOUNT -----
NET ROUNDING	3.

TOTAL	3.
	=====

STATE(S) WHERE THE FOUNDATION IS REGISTERED
=====

TX

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

=====

OFFICER NAME:

BANK OF AMERICA, N.A.

ADDRESS:

P.O. BOX 830241

DALLAS, TX 75283-0241

TITLE:

CO-TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 40

COMPENSATION 55,769.

OFFICER NAME:

DAVID JACKSON

ADDRESS:

5556 CARUTH HAVEN LN

DALLAS, TX 75225

TITLE:

CO-TRUSTEE

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 40

COMPENSATION 27,000.

TOTAL COMPENSATION:

82,769.

=====

RECIPIENT NAME:

MR. DAVID JACKSON

ADDRESS:

5556 CARUTH HAVEN LN
DALLAS, TX 75225

RECIPIENT'S PHONE NUMBER: 214-363-9000

FORM, INFORMATION AND MATERIALS:

THE FOUNDATION WILL PROVIDE INFORMATION REGARDING THE SCHOLARSHIP PROGRAM TO THE INSTITUTIONS. PROSPECTIVE RECIPIENTS OF THE AWARDS WILL COMPLETE APPLICATION FORMS PROVIDED BY THE INSTITUTION.

SUBMISSION DEADLINES:

SUBMISSION DEADLINE IS DECEMBER 31 OF EACH SUCCESSIVE YEAR.

RESTRICTIONS OR LIMITATIONS ON AWARDS:

ONE-THIRD OF INCOME TO TEXAS HISTORY ORGANIZATIONS OR COLLEGES OR UNIVERSITIES TO BE USED TOWARD THE SUPPORT OF THE STUDY, RESEARCH & TEACHING OF TEXAS HISTORY.

RESTRICTIONS OR LIMITATIONS ON AWARDS:

ONE-THIRD OF INCOME TO SCHOLARSHIPS AND GRANTS IN MEDICAL RESEARCH.

RESTRICTIONS OR LIMITATIONS ON AWARDS:

ONE-THIRD OF INCOME TO SCHOLARSHIPS IN RECOGNIZED GRADUATE SCHOOLS IN BUSINESS, COMMERCE, BANKING, FINANCE AND OIL & GAS. ALL SCHOLARSHIPS MUST BE TO TEXAS RESIDENTS.

SUMMERFIELD G ROBERTS FOUNDATION

75-2341916

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

=====

RECIPIENT NAME:

ALTON OCHSNER MEDICAL
FOUNDATION

ADDRESS:

1514 JEFFERSON HWY. BH STE 240
NEW ORLEANS, LA 70121-2484

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

ANNUAL DISTRIBUTION PER ARTICLE 4.05

FOUNDATION STATUS OF RECIPIENT:

PUBLIC 501(C)(3)

AMOUNT OF GRANT PAID 27,788.

RECIPIENT NAME:

SOUTHERN METHODIST
UNIVERSITY

ADDRESS:

P.O. BOX 720135
DALLAS, TX 75275

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT DISSERTATION WRITING FELLOWS PROGRAM

FOUNDATION STATUS OF RECIPIENT:

PUBLIC 501(C)(3)

AMOUNT OF GRANT PAID 25,000.

RECIPIENT NAME:

TEXAS STATE HISTORICAL
ASSOCIATION

ADDRESS:

P.O. BOX 28527
AUSTIN, TX 78755

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT TEXAS HISTORY DAY/HISTORIAN MEETING

FOUNDATION STATUS OF RECIPIENT:

PUBLIC 501(C)(3)

AMOUNT OF GRANT PAID 20,000.

STATEMENT 12

SUMMERFIELD G ROBERTS FOUNDATION

75-2341916

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

RECIPIENT NAME:

BAYLOR HEALTH CARE SYSTEM
FOUNDATION

ADDRESS:

2001 BRYAN ST, STE 2300
DALLAS, TX 75201

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

FUND TRIAL FOR CORNARY ARTERY DISEASE

FOUNDATION STATUS OF RECIPIENT:

PUBLIC 501(C)(3)

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:

TEXAS TECH UNIVERSITY
FOUNDATION

ADDRESS:

P.O. BOX 41102
LUBBOCK, TX 79409

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT 3-YEAR GRADUATE SCHOLARSHIP PROGRAM

FOUNDATION STATUS OF RECIPIENT:

PUBLIC 501(C)(3)

AMOUNT OF GRANT PAID 81,800.

RECIPIENT NAME:

BIG THOUGHT

ADDRESS:

2501 OAK LAWN AVE, #550, LB 42
DALLAS, TX 75219

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT TEXAS HISTORY PROGRAMS FOR ELEMENTARY

FOUNDATION STATUS OF RECIPIENT:

PUBLIC 501(C)(3)

AMOUNT OF GRANT PAID 2,500.

STATEMENT 13

RECIPIENT NAME:

METHODIST HEALTH SYSTEM
FOUNDATION

ADDRESS:

1441 N BECKLEY AVE
DALLAS, TX 75203

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT FOR CLINICAL STUDIES

FOUNDATION STATUS OF RECIPIENT:

PUBLIC 501(C)(3)

AMOUNT OF GRANT PAID 22,788.

RECIPIENT NAME:

MARY CROWLEY CANCER FOUNDATION

ADDRESS:

1700 PACIFIC AVE, STE 1100
DALLAS, TX 75201

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CANCER VACCINE RESEARCH

FOUNDATION STATUS OF RECIPIENT:

PUBLIC 501(C)(3)

AMOUNT OF GRANT PAID 22,788.

RECIPIENT NAME:

CITY OF UNIVERSITY PARK

ADDRESS:

3800 UNIVERSITY BLVD
UNIVERSITY PARK, TX 75205

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

HISTORICAL PANELS AT COFFEE PARK

FOUNDATION STATUS OF RECIPIENT:

EXEMPT - MUNICIPALITY

AMOUNT OF GRANT PAID 30,000.

SUMMERFIELD G ROBERTS FOUNDATION

75-2341916

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

=====

RECIPIENT NAME:

NO. 1 BRITISH FLYING TRAINING
SCHOOL MUSEUM

ADDRESS:

119 SILENT WINGS BLVD
TERRELL, TX 75160

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

DEVELOP WEBSITE & DIGITAL LIBRARY-HISTORY

FOUNDATION STATUS OF RECIPIENT:

PUBLIC 501(C)(3)

AMOUNT OF GRANT PAID 7,500.

TOTAL GRANTS PAID:

250,164.

=====

STATEMENT 15