efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491091002071

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 12-01-2009 , and ending 11-30-2010

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
STOCKMAN FAMILY FOUNDATION TRUST

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
777 E ATLANTIC AVENUE No C2-395

City or town, state, and ZIP code
DELRAY BEACH, FL 33483

A Employer identification number
85-6104630

B Telephone number (see page 10 of the instructions)
(505) 881-3953

C If exemption application is pending, check here ▶ ☐
D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

H Check type of organization ☑ 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)* ▶$ 17,599,374

J Accounting method ☑ Cash ☐ Accrual
☐ Other (specify) _
(Part I, column (d) must be on cash basis.)

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	300,000			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	165	165		
	4	Dividends and interest from securities	523,326	523,326		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	155,252			
	b	Gross sales price for all assets on line 6a 3,693,792				
	7	Capital gain net income (from Part IV, line 2)		155,252		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	978,743	678,743		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	33,556	0		33,556
	c	Other professional fees (attach schedule)	83,596	83,596		0
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)				
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	117,152	83,596		33,556
	25	Contributions, gifts, grants paid	833,470			833,470
	26	**Total expenses and disbursements.** Add lines 24 and 25	950,622	83,596		867,026
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	28,121			
	b	**Net investment income** (if negative, enter -0-)		595,147		
	c	**Adjusted net income** (if negative, enter -0-)				

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	300,136	204,282	204,282
	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)	1,997,169	1,121,461	1,178,973
	b	Investments—corporate stock (attach schedule)	9,593,991	10,847,554	12,420,559
	c	Investments—corporate bonds (attach schedule)	3,754,337	3,500,457	3,795,560
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	15,645,633	15,673,754	17,599,374
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)	0	0	
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	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	15,645,633	15,673,754	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	15,645,633	15,673,754	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	15,645,633	15,673,754	

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	15,645,633
2	Enter amount from Part I, line 27a	2	28,121
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	15,673,754
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	15,673,754

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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	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	155,252
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	640,349	15,252,472	0 041983
2007	1,015,665	18,533,917	0 054800
2006	937,496	21,300,956	0 044012
2005	910,127	19,267,946	0 047235
2004	942,116	19,345,098	0 048701

2	**Total** of line 1, column (d).	2	0 236731
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 047346
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	16,853,539
5	Multiply line 4 by line 3.	5	797,948
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	5,951
7	Add lines 5 and 6.	7	803,899
8	Enter qualifying distributions from Part XII, line 4.	8	867,026

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 letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	5,951
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0
3	Add lines 1 and 2			3	5,951
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	5,951
6	Credits/Payments				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	23,126		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c			
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	23,126
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	17,175
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 17,175	**Refunded** ▶		11	0

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		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)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		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? *If "Yes," attach a detailed description of the activities.*	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? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		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? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ NM			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	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)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10	Yes	

Part VII-A Statements Regarding Activities (continued)

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		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?	13	Yes	

Website address ▶n/a

14 The books are in care of ▶KARL W GUSTAFSON Telephone no ▶(505) 881-3953

Located at ▶7020 PROSPECT PLACE NE albuquerque NM ZIP+4 ▶87110

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.

			Line	Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☑ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?		1b		No
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c		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?	☐ Yes ☑ No			
	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))? ☐ Yes ☑ No

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

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

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

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

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b**

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No

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 Additional Data Table				

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, 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		
Total number of others receiving over $50,000 for professional services . . . . ▶		0

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

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
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	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. 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	16,543,556
b	Average of monthly cash balances	1b	566,636
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	17,110,192
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	17,110,192
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	256,653
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	16,853,539
6	**Minimum investment return.** Enter 5% of line 5	6	842,677

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	842,677
2a	Tax on investment income for 2009 from Part VI, line 5 — 2a: 5,951		
b	Income tax for 2009 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	5,951
3	Distributable amount before adjustments Subtract line 2c from line 1	3	836,726
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	836,726
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	836,726

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	867,026
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	867,026
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	5,951
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	861,075

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				836,726
2 Undistributed income, if any, as of the end of 2008				
a Enter amount for 2008 only.			6,543	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2009				
a From 2004.				
b From 2005.				
c From 2006.				
d From 2007.				
e From 2008.				
f **Total** of lines 3a through e.	0			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 867,026				
a Applied to 2008, but not more than line 2a			6,543	
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.				836,726
e Remaining amount distributed out of corpus	23,757			
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	23,757			
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)	0			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	23,757			
10 Analysis of line 9				
a Excess from 2005. . . .				
b Excess from 2006. . . .				
c Excess from 2007. . . .				
d Excess from 2008. . . .				
e Excess from 2009. . . . 23,757				

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)

	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 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

hervey s stockman jr
4475 N OCEAN BLVD 5-B
DELRAY BEACH, FL 33483
(561) 265-0244

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

the application should be typed and contain information necessary to determine if the applicant qualifies as a charity under irc sec 501 (c)(3)

c Any submission deadlines

NONE

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

GRANTS ARE MADE TO ORGANIZATIONS TO ADVANCE THE KNOWLEDGE AND PRACTICE OF CONSERVATION OF HISTORIC AND ARTISTIC PROPERTY IN THE MUSEUM AND UNIVERSITY DOMAIN GRANTS SHOULD SEEK TO SUPPORT SPECIFIC CONSERVATION PROJECTS INVOL- VING HISTORIC/ARTISTIC PROPERTY, ENCOURAGE ACQUISITION OF EQUIPMENT/LABORA- TORY FACILITIES, AND PROVIDE TEACHING OPPORTUNITIES IN THE FIELD

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				833,470
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	165	
4 Dividends and interest from securities. . . .			14	523,326	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	155,252	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		0		678,743	0

13 Total. Add line 12, columns (b), (d), and (e). **13** 678,743

(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 organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	**1a(1)**		**No**
(2) Other assets	**1a(2)**		**No**
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	**1b(1)**		**No**
(2) Purchases of assets from a noncharitable exempt organization	**1b(2)**		**No**
(3) Rental of facilities, equipment, or other assets	**1b(3)**		**No**
(4) Reimbursement arrangements	**1b(4)**		**No**
(5) Loans or loan guarantees	**1b(5)**		**No**
(6) Performance of services or membership or fundraising solicitations	**1b(6)**		**No**
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	**1c**		**No**

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

(a) Name of organization	**(b)** Type of organization	**(c)** Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

****** | 2011-03-26 | ******

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

		Date	Check if self-employed ☐	Preparer's identifying number (see **Signature** on page 30 of the instructions)
Preparer's Signature	KARL W GUSTAFSON			
Firm's name (or yours if self-employed), address, and ZIP code	PELTIER GUSTAFSON & MILLER P A 7020 PROSPECT PLACE NE ALBUQUERQUE, NM 87110		EIN Phone no (505) 881-3953	

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491091002071

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**

OMB No 1545-0047

2009

Name of organization
STOCKMAN FAMILY FOUNDATION TRUST

Employer identification number
85-6104630

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule—

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not aggregate to more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year . . . . ▶ $ ____________

Caution. An Organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box in the heading of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization
STOCKMAN FAMILY FOUNDATION TRUST

Employer identification number
85-6104630

Part I **Contributors** (see Instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	hervey s stockman 1041 matador avenue se albuquerque, NM 87123	$ 300,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization	**Employer identification number**
STOCKMAN FAMILY FOUNDATION TRUST	85-6104630

Part II **Noncash Property** (see Instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization
STOCKMAN FAMILY FOUNDATION TRUST

Employer identification number
85-6104630

Part III ***Exclusively*** **religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than $1,000 for the year.** (Complete columns **(a)** through **(e)** and the following line entry)
For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** for the year (Enter this information once See instructions) ▶ $

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

Additional Data

Software ID: 09000028
Software Version: 2009.05000
EIN: 85-6104630
Name: STOCKMAN FAMILY FOUNDATION TRUST

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)
DBTC CAP VALUE FUND	P		
DBTC INTERNATIONAL FUND	P		
45 SHS AOL	P	2006-05-31	2009-12-10
1200 SHS RESEARCH IN MOTION	P	2008-01-18	2009-12-31
1500 SHS XTO ENERGY	P	2008-06-02	2010-01-27
2000 SHS TEXAS INSTR	P	2006-09-19	2010-01-29
6000 SHS INTEL CORP	P	1981-07-07	2010-01-29
200 SHS APPLE	P	2008-01-18	2010-01-29
2000 SHS CISCO	P	2008-05-27	2010-01-29
151 SHS AOL	P	2006-05-31	2010-01-29
150000 us treas	P	2010-04-13	2010-05-13
500 shs monsanto	P	2008-01-18	2010-04-19
1000 shs transocean	P	2008-09-30	2010-04-30
4000 shs cameron intl	P	2006-05-15	2010-05-03
950 shs monsanto	P	2008-05-15	2010-05-04
50 shs monsanto	P	2008-09-30	2010-05-04
2500 shs spdr gold tr	P	2009-04-27	2010-05-13
600000 united states treas	P	2010-06-02	2010-08-04
1000 shs stericycle	P	2008-09-30	2010-08-04
50000 united states treas	P	2010-06-02	2010-08-11
50000 united states treas	P	2010-06-02	2010-08-12
500000 fnma redemption	P	2006-06-20	2010-08-16
50000 united states treas	P	2010-06-02	2010-09-02
200000 united states treas	P	2006-06-20	2010-09-30
250000 home depot	P	2009-03-23	2010-09-30
1666 shs time warner	P	2006-05-31	2010-10-04
200000 united states treas	P	2006-06-20	2010-10-05
408 shs frontier comm	P	2008-10-29	2010-10-05
1900 shs at&t	P	2008-10-29	2010-10-05
1000 shs us bancorp del	P	2008-05-27	2010-10-14

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)
5,696			5,696
33,113			33,113
11		13	-2
81,274		106,977	-25,703
68,142		95,595	-27,453
44,701		63,782	-19,081
116,045		2,406	113,639
38,192		32,246	5,946
45,101		55,036	-9,935
3,617		4,394	-777
149,983		149,983	0
32,844		52,566	-19,722
72,819		110,673	-37,854
153,437		91,444	61,993
58,928		98,338	-39,410
3,102		5,037	-1,935
303,295		222,900	80,395
599,768		599,768	0
63,819		58,073	5,746
49,981		49,981	0
49,981		49,981	0
500,000		500,000	0
49,981		49,981	0
208,344		199,853	8,491
254,465		253,880	585
50,450		60,254	-9,804
208,203		199,172	9,031
3,407		3,266	141
55,542		51,949	3,593
22,133		32,960	-10,827

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	
			5,696
			33,113
			-2
			-25,703
			-27,453
			-19,081
			113,639
			5,946
			-9,935
			-777
			0
			-19,722
			-37,854
			61,993
			-39,410
			-1,935
			80,395
			0
			5,746
			0
			0
			0
			0
			8,491
			585
			-9,804
			9,031
			141
			3,593
			-10,827

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)
1000 shs jp morgan	P	2006-05-31	2010-10-14
500 shs energizer holdings	P	2008-05-27	2010-10-14
500 shs celanese corp	P	2008-09-30	2010-10-14
200 shs ibm	P	2003-12-30	2010-10-14
500 shs energizer holdings	P	2008-05-27	2010-11-02
3000 shs intel	P	1981-07-07	2010-11-12
253 68 shs db us large cap value	P	1993-01-08	2010-11-15

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)
38,562		42,910	-4,348
37,164		40,025	-2,861
16,976		13,933	3,043
28,152		18,634	9,518
32,411		40,025	-7,614
64,153		1,203	62,950
150,000		181,302	-31,302

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	
			-4,348
			-2,861
			3,043
			9,518
			-7,614
			62,950
			-31,302

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
KARL W GUSTAFSON 7020 PROSPECT PL NE Albuquerque, NM 87110	TREASURER 1 00	0	0	0
DEUTSCHE BANK TRUST COMPANY NA 345 PARK AVENUE NEW YORK, NY 10154	TRUSTEE 1 00	0	0	0
allison a stockman 1517 S STREET NW APT B washington, DC 20009	director 0 00	0	0	0
pamela proctor 10 crest rd rowayton, CT 06853	director 0 00	0	0	0
hervey s stockman JR 4475 N OCEAN BLVD 5-B DELRAY BEACH, FL 33483	pRESIDENT 1 00	0	0	0
CHARLES C STOCKMAN 800 NW 56TH STREET SEATTLE, WA 98107	Director 0 00	0	0	0
ROBERT P STOCKMAN 1517 S STREET NW APT B WAShington, DC 20009	DIRECTOR 0 00	0	0	0

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
norwalk land trust inc455 post road darien, CT 06820	none	public charity	funding the campaign for the farm creek preserve	20,000
greater baltimore medical center foundation6701 north charles street baltimore, MD 21204	none	public charity	upgrade physical spaces in the radiation encology	15,000
school for advanced research on the human experiencep o box 2188 santa fe, NM 875042188	none	public charity	conservation treatment of five paintings in the permanent collection	41,450
buffalo state college1300 elmwood avenue gc 319 buffalo, NY 142221095	none	public charity	endowment for conservation science	60,000
georgia o'keeffe museum217 johnson street santa fe, NM 87501	none	public charity	acquire a microfadeometer and portable xrf	65,000
williamstown art conservation center 227 south street williamstown, MA 01267	none	public charity	purchase a digital x-ray system	68,815
national new deal preservation association-nm chapterp o box 602 santa fe, NM 87505	none	public charity	rematting the gene kloss etchings & b j nordfeldt lithographs	3,725
evergreen museum & library4545 n charles street baltimore, MD 21201	none	public charity	conservation of six tiffany lighting pieces	18,000
norton museum of art1451 south olive avenue palm beach, FL 33401	none	public charity	conservation & related expenses outlined in the project exp proposal	48,000
everyman theatre1727 n charles street baltimore, MD 21201	none	public charity	renovation of the new everyman theatre	20,000
american museum of natural history central park west at 79th street new york, NY 10024	none	public charity	conservation of red cedar wood totem poles and other large scale carvings	50,000
cincinnati art museum953 eden park drive cincinnati, OH 45202	none	public charity	preservation of the musical instrument collection	31,000
corcoran museum of art500 seventeenth st nw washington, DC 20006	none	public charity	conservation treatment of rembrandt peale's portrait of george washington	25,000
opera house artsp o box 56 stonington, ME 04681	none	public charity	preservation & maintenance of the stonington opera house	5,000
pratt institute200 willoughby avenue brooklyn, NY 11205	none	public charity	continue post doctoral fellowship in chemistry for the arts	35,000
Total . . . . ▶ **3a**				833,470

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
fine arts museums of san francisco50 hagiwara tea garden drive san francisco, CA 941184502	none	public charity	purchase of a xrf analyzer system	49,500
enoch pratt free library400 cathedral street baltimore, MD 21201	none	public charity	provision of computer and internet services	20,000
walters art museum600 north charles street baltimore, MD 21201	none	public charity	support the senior conservator for manuscripts & rare books	75,000
new mexico state university foundationp o box 3590 las cruces, NM 88003	none	public charity	support the undergraduate studies program in art & museum conservation	50,000
art institute of chicago116 s michigan avenue chicago, IL 60603	none	public charity	SURVEY, ANALYSIS & CONSERVATION RESEARCH OF PABLO PICASSO'S RIPOLIN PAINTING	67,980
smithsonian freer gallery of artp o box 37012-mrc 707 washington, DC 20013	none	public charity	support the chinese painting conservation program	65,000
Total . . . . ▶ **3a**				833,470

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491091002071

TY 2009 Accounting Fees Schedule

Name: STOCKMAN FAMILY FOUNDATION TRUST

EIN: 85-6104630

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION/CONSULTING/BKKG	33,556	0		33,556

TY 2009 Investments Corporate Bonds Schedule

Name: STOCKMAN FAMILY FOUNDATION TRUST

EIN: 85-6104630

Name of Bond	End of Year Book Value	End of Year Fair Market Value
cisco sys corp bonds	298,509	303,195
morgan stanley sr global mtn	403,000	419,244
sbc commun global	409,400	433,412
bank one corp sub	492,675	537,705
glaxosmithkline cap inc	505,640	546,540
international business machines	508,755	575,710
american express	476,050	566,950
HOME DEPOT	0	0
chevron corp	406,428	412,804

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491091002071

TY 2009 Investments Corporate Stock Schedule

Name: STOCKMAN FAMILY FOUNDATION TRUST

EIN: 85-6104630

Name of Stock	End of Year Book Value	End of Year Fair Market Value
deutsche bank CAPITAL VALUE FUND	231,298	188,356
deutsche bank INTERNATIONAL FUND	1,615,716	1,466,579
CISCO SYSTEM INC	187,152	153,280
MICROSOFT	193,290	176,803
GENERAL ELECTRIC	387,439	189,960
EXXON MOBIL CORP	182,315	278,240
fortune brands ınc	110,120	118,180
proctor & gamble	151,695	183,210
walmart stores	111,291	108,180
ıbm	157,848	254,628
amerıcan express	79,583	86,440
avery dennıson corp	53,030	37,540
unıted technologıes	216,210	376,350
praxaır ınc	63,827	184,100
entergy corp new	50,108	71,240
sysco corp	101,031	87,060
APACHE CORP	82,850	215,280
CONOCO PHILLIPS	86,427	120,340
US BANCORP DEL	144,249	118,900
PACCAR INC	50,684	107,720
tıme warner ınc	0	0
cameron ıntl corp	0	0
chevron corp	125,935	161,940
occıdental pete corp	45,397	88,170
ȷohnson & ȷohnson	122,425	123,100
emc	94,220	150,430
qualcomm ınc	173,208	187,280
texas ınstruments	0	0
ȷ p morgan	292,663	299,200
dıvıdend ıncome receıvable	10,010	10,010

Name of Stock	End of Year Book Value	End of Year Fair Market Value
intel	6,256	380,835
comcast	38,625	28,455
celgene corp com	232,938	237,520
dws high inc fund	487,073	509,595
mcdonalds corp	115,140	156,600
energizer hldgs inc	0	0
pepsico inc	142,737	129,260
national oil well	74,816	91,935
xto energy	0	0
transocean inc	0	0
bank new york mellon	96,932	59,378
ametek inc new	179,557	236,680
stericycle inc	0	0
apple inc	175,554	373,380
oracle	62,490	81,135
research in motion	0	0
celanese corp	41,798	55,500
freeport mcmoran copper	119,511	151,980
monsanto	0	0
at&t	0	0
american tower	80,669	101,140
verizon comm	49,616	54,417
gilead sciences inc	63,103	54,750
eaton vance stru emer	1,075,000	1,298,498
t rowe price japan fd intl	350,000	377,960
spdr gold trust	0	0
goldman sachs group	147,914	156,140
artio global high inc fund	300,000	299,425
intl inv funds	150,000	146,739
borg warner	52,838	60,340

Name of Stock	End of Year Book Value	End of Year Fair Market Value
marriott intl inc	54,267	58,815
nike inc	40,268	43,065
kellogg co	59,772	59,076
anadarko pete corp	94,358	96,240
pnc finl svcs	90,735	80,775
schwab charles	42,777	45,090
amgen	54,800	52,690
express scripts	130,780	143,248
thoratec corp	50,228	38,250
zimmer hldgs	0	98,520
concur technologies	63,733	76,815
hewlett packard	62,327	50,316
mosaic co comm	46,334	50,723
schroder us small and mid fund	250,000	256,573
ipath dow jones ubs com	644,587	686,185

TY 2009 Investments Government Obligations Schedule

Name: STOCKMAN FAMILY FOUNDATION TRUST

EIN: 85-6104630

US Government Securities - End of Year Book Value:	1,121,461
US Government Securities - End of Year Fair Market Value:	1,178,973
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2009 Other Professional Fees Schedule

Name: STOCKMAN FAMILY FOUNDATION TRUST

EIN: 85-6104630

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
deutsche bank trust company n a -FIDUCIARY FEES	83,596	83,596		0

TY 2009 Substantial Contributors Schedule

Name: STOCKMAN FAMILY FOUNDATION TRUST

EIN: 85-6104630

Name	Address
HERVEY s STOCKMAN	1041 MATADOR DR SE albuquerque, NM 87123