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Return of Private Foundation

OMB No 1545-0052

or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

2010

Department of the Treasury
Internal Revenue Service

Note The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2010, or tax year beginning , and ending

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Name of foundation BAUMBERGER ENDOWMENT		A Employer identification number 23-7225925
Number and street (or P.O. box number if mail is not delivered to street address) 7201 BROADWAY, SUITE 300	Room/suite	B Telephone number (210) 822-8915
City or town, state, and ZIP code SAN ANTONIO, TX 78209		C If exemption application is pending, 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		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 28,085,894.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify)	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
(Part I, column (d) must be on cash basis)		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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		691,008.	691,008.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		155,564.			
b Gross sales price for all assets on line 6a 5,301,133.			155,564.		
7 Capital gain net income (from Part IV, line 2)					
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total Add lines 1 through 11		846,572.	846,572.		
13 Compensation of officers, directors, trustees, etc		19,000.	9,500.		9,500.
14 Other employee salaries and wages		73,002.	3,650.		69,352.
15 Pension plans, employee benefits		30,923.	1,546.		29,377.
16a Legal fees					
b Accounting fees STMT 2		17,865.	9,826.		8,039.
c Other professional fees STMT 3		67,085.	67,085.		0.
17 Interest					
18 Taxes STMT 4		17,499.	11,174.		0.
19 Depreciation and depletion		1,176.	118.		
20 Occupancy		23,116.	2,311.		20,805.
21 Travel, conferences, and meetings					
22 Printing and publications		4,390.	439.		3,951.
23 Other expenses STMT 5		48,314.	3,398.		44,916.
24 Total operating and administrative expenses. Add lines 13 through 23		302,370.	109,047.		185,940.
25 Contributions, gifts, grants paid		1,201,667.			1,201,667.
26 Total expenses and disbursements. Add lines 24 and 25		1,504,037.	109,047.		1,387,607.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-657,465.			
b Net investment income (if negative, enter -0-)			737,525.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	15,658.	3,349.	3,349.
	2 Savings and temporary cash investments	583,688.	722,745.	722,745.
	3 Accounts receivable ▶ 24,885.			
	Less: allowance for doubtful accounts ▶	1,616.	24,885.	24,885.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	22,016.	10,000.	10,000.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 7	10,657,761.	8,394,507.	10,351,324.
	c Investments - corporate bonds STMT 8	3,397,466.	3,920,601.	4,207,310.
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans STMT 9	2,381,697.	1,455,874.	1,579,083.
	13 Investments - other STMT 10	8,098,457.	9,969,521.	11,184,650.
	14 Land, buildings, and equipment basis ▶ 26,956.			
	Less accumulated depreciation STMT 11 ▶ 24,409.	3,136.	2,547.	2,547.
	15 Other assets (describe ▶ MINERAL INTEREST)	1.	1.	1.
	16 Total assets (to be completed by all filers)	25,161,496.	24,504,030.	28,085,894.
	17 Accounts payable and accrued expenses	1.		
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	1.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	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	25,161,495.	24,504,030.	
30 Total net assets or fund balances	25,161,495.	24,504,030.		
31 Total liabilities and net assets/fund balances	25,161,496.	24,504,030.		

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	25,161,495.
2 Enter amount from Part I, line 27a	2	-657,465.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	24,504,030.
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	24,504,030.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENT			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 5,301,133.		5,145,569.	155,564.

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			155,564.

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	155,564.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	1,241,560.	23,862,927.	.052029
2008	1,528,456.	28,354,266.	.053906
2007	1,072,347.	31,528,975.	.034011
2006	973,037.	29,329,707.	.033176
2005	910,825.	28,023,732.	.032502

2 Total of line 1, column (d)	2	.205624
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	.041125
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	26,463,146.
5 Multiply line 4 by line 3	5	1,088,297.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	7,375.
7 Add lines 5 and 6	7	1,095,672.
8 Enter qualifying distributions from Part XII, line 4	8	1,387,607.

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.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	7,375.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	7,375.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	7,375.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a 10,000.		
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	10,000.	
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	2,625.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax ☒ 2,625. Refunded ☒ 0.	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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 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		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) TX		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>BAUMBERGERENDOWMENT.COM</u>	13	X	
14	The books are in care of ► <u>CYNDE ZIETLOW, EXECUTIVE DIRECTOR</u> Telephone no. ► <u>(210) 822-8915</u> Located at ► <u>7201 BROADWAY, SUITE 300, SAN ANTONIO, TX</u> ZIP+4 ► <u>78209</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	N/A	
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		X
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 2010?		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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If "Yes," list the years ►	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
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 2010 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 2010)	N/A	
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 2010?		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)?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

5b

X

Organizations relying on a current notice regarding disaster assistance check here

☐

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

X

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

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

7b

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

N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		19,000.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CYNTHIA L ZIETLOW - 7201 BROADWAY, SUITE 300, SAN ANTONIO, TX 78209	EXECUTIVE DIRECTOR 40.00	55,000.	22,872.	0.

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	25,908,079.
b	Average of monthly cash balances	1b	958,059.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	26,866,138.
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	26,866,138.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	402,992.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	26,463,146.
6	Minimum investment return. Enter 5% of line 5	6	1,323,157.

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

1	Minimum investment return from Part X, line 6	1	1,323,157.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	7,375.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	7,375.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,315,782.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,315,782.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,315,782.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,387,607.
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	1,387,607.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	7,375.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,380,232.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				1,315,782.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			1,186,821.	
b Total for prior years:				
2008 , _____ , _____		159,361.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$ 1,387,607.				
a Applied to 2009, but not more than line 2a			1,186,821.	
b Applied to undistributed income of prior years (Election required - see instructions) *		159,361.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2010 distributable amount				41,425.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (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	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				1,274,357.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				

* SEE STATEMENT 13

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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 <i>Paid during the year</i>				
SEE STATEMENT 14				
Total				▶ 3a 1,201,667.
b <i>Approved for future payment</i>				
NONE				
Total				▶ 3b 0.

BAUMBERGER ENDOWMENT

CONTINUATION FOR 990-PF, PART IV

23-7225925

PAGE

1 OF

1

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	BROADWAY NATIONAL BANK	P	VARIOUS	VARIOUS
b	BROADWAY NATIONAL BANK	P	VARIOUS	VARIOUS
c	POWERSHARES DP COMMODITY INDEX	P		
d	POWERSHARES DP COMMODITY INDEX	P		
e	LITIGATION SETTLEMENTS	P		
f	MAJESTY OFFSHORE, LTD - NET CAPITAL GAIN	P		
g	CAPITAL GAINS DIVIDENDS			
h				
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 380,273.		361,122.	19,151.
b 4,852,718.		4,784,447.	68,271.
c 9,834.			9,834.
d 17,298.			17,298.
e 643.			643.
f 17,160.			17,160.
g 23,207.			23,207.
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			19,151.
b			68,271.
c			9,834.
d			17,298.
e			643.
f			17,160.
g			23,207.
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	155,564.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BROADWAY NATIONAL BANK	412,651.	23,207.	389,444.
BROADWAY NATIONAL BANK	301,326.	0.	301,326.
POWERSHARES DP COMMODITY INDEX	238.	0.	238.
TOTAL TO FM 990-PF, PART I, LN 4	714,215.	23,207.	691,008.

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CARNEIRO, CHUMNEY & CO, LC	10,265.	5,646.		4,619.
AKIN DOHERTY KLEIN & FEUGE	7,600.	4,180.		3,420.
TO FORM 990-PF, PG 1, LN 16B	17,865.	9,826.		8,039.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BROADWAY BANK	67,085.	67,085.		0.
TO FORM 990-PF, PG 1, LN 16C	67,085.	67,085.		0.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	6,325.	0.		0.
FOREIGN TAXES	11,174.	11,174.		0.
TO FORM 990-PF, PG 1, LN 18	17,499.	11,174.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OFFICE EXPENSE	2,395.	240.		2,155.	
POSTAGE	3,223.	322.		2,900.	
PUBLIC RELATIONS	130.	13.		117.	
REPAIRS & MAINTENANCE	2,434.	243.		2,191.	
SELECTION COMMITTEE	30,410.	0.		30,410.	
SUNDRY EXPENSE	280.	28.		252.	
SUPPLIES	1,772.	177.		1,595.	
TRANSCRIPT COSTS	149.	0.		149.	
TELEPHONE	1,525.	153.		1,373.	
INTERNET ACCESS	365.	36.		328.	
WEB HOSTING	305.	31.		275.	
INSURANCE	3,523.	352.		3,171.	
PORTFOLIO DEDUCTIONS - POWERSHARES	1,803.	1,803.		0.	
TO FORM 990-PF, PG 1, LN 23	48,314.	3,398.		44,916.	

FOOTNOTES

STATEMENT 6

ASSETS LISTED ON PAGE 2, PART II, LINE 2 - TEMPORARY INVESTMENTS INCLUDE CASH EQUIVALENTS WHICH PAY DIVIDENDS. THESE DIVIDENDS ARE INCLUDED ON PAGE 1, PART I, LINE 4.

THE FUNDING OF SCHOLARSHIPS FOR STUDENTS WILL GENERALLY CONTINUE FOR 4 YEARS/8 SEMESTERS AS LONG AS THE STUDENT MAINTAINS A 2.0 GPA, PASSES 24 HOURS DURING THE FALL & SPRING SEMESTERS AND ATTENDS AN ELIGIBLE SCHOOL.

FORM 990-PF

CORPORATE STOCK

STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ABSOLUTE STRATEGIES FUND 90,701.402	968,194.	983,203.
ADOBE SYSTEMS INC 7,030	198,818.	216,383.
ALTRIA GROUP INC 5,315	105,245.	130,855.
APACHE CORP 1,560	74,173.	185,999.
APPLE INC 750	67,338.	241,920.
AT&T INC 6,315	163,556.	185,535.
BERKSHIRE HATHAWAY INC 2,265	157,291.	181,449.
BRISTOL MYERS SQUIBB 6,695	154,887.	177,284.
CVS CAREMARK CORP 4,480	118,063.	155,770.
CATERPILLAR INC 2,865	209,144.	268,336.
CHARLES SCHWAB CORP 11,705	208,379.	200,273.
CHEVRON CORPORATION 1,910	109,004.	174,288.
CISCO SYSTEMS INC 8,645	166,507.	174,888.
COLGATE-PALMOLIVE COMPANY 1,750	117,716.	140,648.
COSTCO WHOLESALE CORP 2,155	96,512.	155,613.
DANAHER CORP DEL COM 4,155	111,903.	195,991.
EMC CORP/MASS 9,425	135,729.	215,833.
EXPRESS SCRIPTS INC 3,715	151,253.	200,796.
EXXON MOBIL CORPORATION 2,725	30,924.	199,252.
GENERAL DYNAMICS CORP 2,640	137,733.	187,334.
GENERAL MILLS INC 3,600	116,916.	128,124.
HCC INSURANCE HOLDINGS INC 6,800	180,440.	196,792.
IBM 1,380	121,304.	202,529.
JOHNSON & JOHNSON 2,845	187,387.	175,963.
JPMORGAN CHASE & CO 4,780	211,662.	202,768.
MDU RESOURCES GROUP INC 9,035	236,668.	183,139.
MONSANTO CO 2,730	219,145.	190,117.
NIKE INC CLASS B 2,215	141,633.	189,205.
OCCIDENTAL PETROLEUM CORP 2,310	168,815.	226,611.
ORACLE CORPORATION 6,745	90,940.	211,119.
PEPSICO INC 2,760	193,835.	180,311.
PHILIP MORRIS INTERNATIONAL INC 2,310	109,772.	135,204.
PPL CORP COM 6,700	196,205.	176,344.
PROCTER & GAMBLE CO 2,125	83,691.	136,701.
TARGET CORP 3,465	139,811.	208,350.
THERMO FISHER SCIENTIFIC INC 3,505	121,827.	194,037.
UNITED TECHNOLOGIES INC 3,015	134,656.	237,341.
VF CORPORATION 2,160	169,518.	186,149.
WALT DISNEY COMPANY 4,985	148,642.	186,987.
INGERSOLL-RAND PLC 3,445	128,113.	162,225.
NOBLE CORPORATION 3,435	98,555.	122,870.
SCHLUMBERGER LIMITED 1,945	132,824.	162,408.
TOTAL SA-SPON ADR 2,175	124,727.	116,319.
VODAFONE GROUP PLC-SP 3,694	109,809.	97,669.
AMPHENOL CORP - CLASS A 3,955	123,328.	208,745.
BLACKROCK INC 1,050	172,048.	200,109.
EMERSON ELECTRIC COMPANY 4,100	180,985.	234,397.

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GOOGLE INC. 325	195,451.	193,040.
PPG INDUSTRIES INC 2,115	135,625.	177,808.
SPDR S&P BIOTECH ETF 3,005	178,956.	189,555.
NOVARTIS AG-ADR 3,155	178,138.	185,987.
SUN LIFE FINANCIAL INC 6,005	180,712.	180,751.
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,394,507.	10,351,324.

FORM 990-PF	CORPORATE BONDS	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ABBOTT LABORATORIES 5.875% DUE 5/15/2016 400,000	416,464.	461,761.
BERKSHIRE HATHAWAY FIN 4.75% DUE 5/15/2012 400,000	392,431.	421,199.
GENERAL ELECTRIC CAPITAL CORP. 5.65% DUE 06/09/2014 400,000	398,848.	438,958.
GOLDMAN SACHS GROUP INC 5.125% DUE 1/15/2015 350,000	344,918.	376,034.
HOME DEPOT INC 5.4% DUE 3/1/16 350,000	351,057.	392,212.
MERRILL LYNCH & CO 5.45% DUE 7/15/2014 350,000	353,241.	367,968.
PEPSICO INC 5.15% DUE 5/15/2012 400,000	392,696.	422,815.
A T & T INC 5.1% DUE 9/15/2014 400,000	398,196.	437,639.
TOYOTA MOTOR CREDIT CORP 5.25% DUE 12/22/2011 350,000	349,615.	360,179.
IBM CORP 2.10% DUE 5/06/2013 250000	253,515.	256,069.
WAL-MART STORES INC 4.50% DUE 7/01/2015 250,000	269,620.	272,476.
TOTAL TO FORM 990-PF, PART II, LINE 10C	3,920,601.	4,207,310.

FORM 990-PF	MORTGAGE LOANS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FEDERAL HOME LOAN MTG CORP 5.625% DUE 3/15/2011 200,000	199,438.	202,125.
FEDERAL HOME LOAN MRG CORP 5.125% DUE 7/15/2012 500,000	506,719.	534,531.
FEDERAL NATL MTG ASSN 6.25% DUE 02/01/2011 227,000	224,668.	227,962.
FEDERAL NATL MTG ASSN 5.375% DUE 06/12/2017 500,000	490,990.	575,625.
GVT NTL MTG ASSN PL #2577 6.5% DUE 4/20/2028 12,355.65	12,213.	13,979.
GVT NTL MTG ASSN PL #2741 6.5% DUE 4/20/2029 13,295.96	13,300.	15,043.

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GVT NTL MTG ASSN GTD PASS THRU CTF POOL #325352 2,747.94	2,762.	3,220.
GVT NTL MTG ASSN POOL #341673 7.0% DUE 1/15/2023 5,784.19	5,784.	6,598.
TOTAL TO FORM 990-PF, PART II, LINE 12	1,455,874.	1,579,083.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
BOSTON PROPERTIES, INC 540	COST	19,924.	46,494.
HCP INC TRUST 1,280	COST	22,421.	47,091.
HEALTHCARE REALTY TRUST INC 885	COST	21,893.	18,735.
HOSPITALITY PROPERTIES TRUST 2,600	COST	72,778.	59,904.
KIMCO REALTY CORPORATION 1,300	COST	37,847.	23,452.
MACK-CALI REALTY CORPORATION 1,400	COST	41,838.	46,284.
PUBLIC STORAGE INC 700	COST	19,276.	70,994.
REALTY INCOME CORPORATION 1,000	COST	16,330.	34,200.
SIMON PROPERTY GROUP (PREV SIMON DEBARTOLO GRP) 835	COST	23,264.	83,074.
TANGER FACTORY OUTLET CENTER 1,800	COST	28,654.	92,142.
VANGUARD INFLATION-PROTECTED SECURITES FUND 49,547.344	COST	1,216,049.	1,265,439.
COLUMBIA ACORN FUND CL Z 26,276.141	COST	671,169.	793,277.
LOOMIS SAYLES SMALL CAP VALUE FUND #1165 15,539.672	COST	363,394.	413,355.
VANGUARD EXPLORER FUND ADMIRAL SHARES 5,974.477	COST	401,796.	405,309.
AMERICAN FUNDS-EUROPACIFIC GROWTH FUND 38,956.302	COST	1,561,475.	1,603,441.
TEMPLETON FOREIGN EQUITY SERIES 41,596.556	COST	988,903.	834,011.
ISHARES MSCI EAFE INDEX FUND 12,335	COST	522,903.	718,144.
MAJESTY OFFSHORE, LTD 700,000	COST	726,998.	777,097.
AMERICAN CAPITAL WORLD BOND FUND 19,912.768	COST	373,334.	404,627.
LOOMIS SAYLES GLOBAL BOND FUND 26,483.77	COST	373,333.	439,895.
TEMPLETON GLOBAL BOND FUND 31,903.47	COST	373,333.	433,568.
IPATH DOW JONES-AIG COMMODITY INDEX FUND 6,450 SHS	COST	240,736.	316,824.
POWERSHARES DB COMMODITY INDEX 8,920 SHS	COST	246,803.	245,746.
SPDR GOLD TRUST 4,720	COST	437,012.	654,758.
VANGUARD SELECTED VALUE FUND 41,417.165	COST	666,816.	776,986.
LAZARD EMERGING MARKETS 13,414.905	COST	249,690.	292,177.
ISHARES MSCI EMERGING MARKETS INDEX FUND 4,390	COST	173,361.	209,148.

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VANGUARD EMERGING MARKET ETF 1,630	COST	78,191.	78,478.
TOTAL TO FORM 990-PF, PART II, LINE 13		9,969,521.	11,184,650.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 11

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
OFFICE FURNITURE AND FIXTURES	7,843.	7,844.	-1.
OFFICE EQUIPMENT	6,240.	6,240.	0.
FILE EQUIPMENT	530.	530.	0.
TYPEWRITER	89.	89.	0.
PHONE SYSTEM	745.	745.	0.
VERTICAL FILE	540.	540.	0.
BROTHER TYPEWRITER	105.	105.	0.
SEALER-POSTAGE METER	175.	175.	0.
COMDIAL PHONE SYSTEM	1,115.	1,115.	0.
FILE CABINETS	534.	534.	0.
OFFICE CHAIRS	440.	440.	0.
COMPUTER TABLE	60.	38.	22.
GATEWAY COMPUTER 1730	1,846.	1,846.	0.
COMPUTER NETWORK/DSL CONNECTION	1,109.	1,109.	0.
GATEWAY COMPUTER	1,079.	936.	143.
COPY STAR CS-2550 DIGITAL COPIER	3,919.	1,960.	1,959.
DOVE DATA SYSTEMS	587.	163.	424.
TOTAL TO FM 990-PF, PART II, LN 14	26,956.	24,409.	2,547.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 12

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
RONALD SCHMIDT P.O. BOX 6067 SAN ANTONIO, TX 782090067	CHAIRMAN 4.00	3,800.	0.	0.
FRANK BURK P.O. BOX 6067 SAN ANTONIO, TX 782090067	SECRETARY 2.00	3,800.	0.	0.
ALBERT J TIETZE JR P.O. BOX 6067 SAN ANTONIO, TX 782090067	TRUSTEE 2.00	3,800.	0.	0.
KENNETH M TAGGART P.O. BOX 6067 SAN ANTONIO, TX 782090067	TRUSTEE 2.00	3,800.	0.	0.
NANCY MAY P.O. BOX 6067 SAN ANTONIO, TX 782090067	TRUSTEE 2.00	3,800.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		19,000.	0.	0.

FORM 990-PF

ELECTION UNDER REGULATIONS SECTION
53.4942(A)-3(D)(2) TO APPLY
EXCESS QUALIFYING DISTRIBUTIONS
TO PRIOR YEAR'S UNDISTRIBUTED INCOME

STATEMENT 13

PURSUANT TO IRS SEC 4942(H)(2) AND REG. 53.4942(A)-3(D)(2), THE
BAUMBERGER ENDOWMENT HEREBY ELECTS TO TREAT CURRENT YEAR QUALIFYING
DISTRIBUTIONS IN EXCESS OF THE IMMEDIATELY PRECEDING TAX YEAR'S
UNDISTRIBUTED INCOME AS BEING MADE OUT OF UNDISTRIBUTED INCOME FROM
THE TAX YEAR ENDING IN 2008 IN THE AMOUNT OF \$159,361.

SIGNED:

Kenneth M. TaggartKenneth M. Taggart - Trustee

NAME AND TITLE

November 15, 2011

DATE

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 14

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AUSTIN COLLEGE 900 N GRAND AVE SHERMAN, TX 75090-4400	N/A SCHOLARSHIPS	PUBLIC	10,500.
NORTHWEST VISTA COLLEGE 3535 N ELLISON DR SAN ANTONIO, TX 78251	N/A SCHOLARSHIPS	PUBLIC	2,500.
RICE UNIVERSITY 6100 MAIN STREET HOUSTON, TX 77005-1827	N/A SCHOLARSHIPS	PUBLIC	31,500.
SAM HOUSTON STATE UNIVERSITY 1903 UNIVERSITY AVE HUNTSVILLE, TX 77340	N/A SCHOLARSHIPS	PUBLIC	13,000.
SAN ANTONIO COLLEGE 1300 SAN PEDRO AVE SAN ANTONIO, TX 78212-4299	N/A SCHOLARSHIPS	PUBLIC	5,000.
STEPHEN F AUSTIN UNIVERSITY 1936 NORTH ST NACOGDOCHES, TX 75961	N/A SCHOLARSHIPS	PUBLIC	5,250.
TEXAS A & M UNIVERSITY THE PAVILION COLLEGE STATION, TX 77843	N/A SCHOLARSHIPS	PUBLIC	320,525.
TEXAS A & M UNIVERSITY AT CORPUS CHRISTI 6300 OCEAN DRIVE CORPUS CHRISTI, TX 78412	N/A SCHOLARSHIPS	PUBLIC	10,500.

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TEXAS A & M UNIVERSITY AT SAN ANTONIO 1450 GILLETTE BLVD SAN ANTONIO, TX 78224	N/A SCHOLARSHIPS	PUBLIC	5,250.
TEXAS STATE UNIVERSITY 501 UNIVERSITY DRIVE SAN MARCOS, TX 78666	N/A SCHOLARSHIPS	PUBLIC	39,000.
TEXAS TECH UNIVERSITY 2500 BROADWAY LUBBOCK, TX 79409	N/A SCHOLARSHIPS	PUBLIC	21,000.
TEXAS WOMAN'S UNIVERSITY 304 ADMINISTRATION DRIVE DENTON, TX 76204	N/A SCHOLARSHIPS	PUBLIC	5,250.
THE UNIVERSITY OF TEXAS AT ARLINGTON 701 S NEDDERMAN DRIVE ARLINGTON, TX 76019	N/A SCHOLARSHIPS	PUBLIC	5,250.
THE UNIVERSITY OF TEXAS AT AUSTIN BOX 7758, UNIV STA AUSTIN, TX 78712	N/A SCHOLARSHIPS	PUBLIC	451,142.
THE UNIVERSITY OF TEXAS AT SAN ANTONIO ONE UTSA CIRCLE SAN ANTONIO, TX 78249-1644	N/A SCHOLARSHIPS	PUBLIC	191,750.
TRINITY UNIVERSITY ONE TRINITY PLACE SAN ANTONIO, TX 78212-7200	N/A SCHOLARSHIPS	PUBLIC	57,750.
UNIVERSITY OF HOUSTON 4800 CALHOUN RD HOUSTON, TX 77004	N/A SCHOLARSHIPS	PUBLIC	15,750.
UTHSC - SAN ANTONIO 7703 FLOYD CURL DR SAN ANTONIO, TX 78229	N/A SCHOLARSHIPS	PUBLIC	2,750.

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PALO ALTO COLLEGE
1400 W. VILLARET BLVD SAN
ANTONIO, TX 78224

N/A
SCHOLARSHIPS

PUBLIC

2,750.

TEXAS A & M UNIVERSITY AT
KINGSVILLE
700 UNIVERSITY BLVD KINGSVILLE,
TX 78363

N/A
SCHOLARSHIPS

PUBLIC

5,250.

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

1,201,667.

2010-2011 Schedule

1. Applicants should take SAT or ACT on a Fall testing date.
(January or February dates are too late.)
2. Nov. - Dec. 2010 - Obtain application from High School Counselor.
3. Feb. 15, 2011 - Deadline for completed application, official transcript, and financial information form to be submitted to:

*Baumberger Endowment
7201 Broadway, Suite 300
San Antonio, TX 78209*

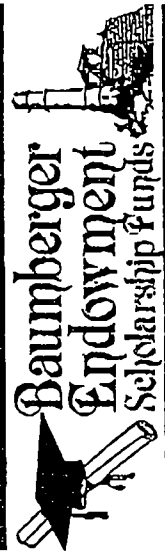
4. May 2011 - Announcement of Baumberger Scholars.

Baumberger Scholars are:

- ★ *evaluated* on a competitive basis without regard to race, color, ethnic origin, sex, age, or religion.
- ★ *selected* by an impartial Selection Committee of professional educators.
- ★ *awarded* renewable scholarships with the amount of stipend calculated each year based on college costs and student resources.
- ★ *challenged* to pursue quality higher education to the fullest extent culminating in a degree.



For additional information, contact your High School Counselor or the Endowment Office.



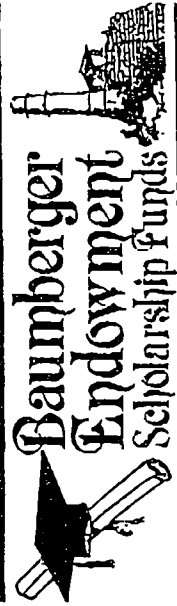
7201 Broadway • Suite 300
San Antonio, Texas 78209
(210) 822-8915 FAX (210) 822-6598
E-Mail: baumendow@sbcglobal.net
www.baumbergerendowment.com

BAUMBERGER ENDOWMENT

33rd Annual

Scholarships

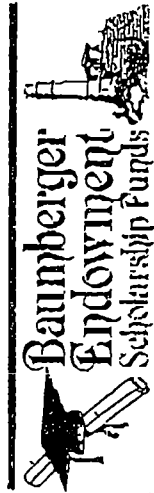
2011 - 2012



Competition

Open to
Graduating Seniors
Class of 2011
of High Schools
in Bexar County

established in the Last Will and Testament of Charles Baumberger, Jr. He was a lifetime resident of San Antonio and a former President of the Board of San Antonio Portland Cement Company. His father was one of the founders of San Antonio Portland Cement Company and one of the organizers of Bexar County National Bank. Charles Baumberger, Jr. and his wife, Gene, had no children. After providing for his wife during her lifetime, Mr. Baumberger stipulated in his Will that the income from his fortune be devoted to the education in the basic arts and sciences of Texas youth. The Endowment is guided by specific requirements stated in Mr. Baumberger's Will and by policies set by the Trustees of the Endowment.



REQUIREMENTS:

An Applicant Must --

- (1) be a graduating senior (Class of 2011) of an accredited (TEA) high school within Bexar County, Texas.
- (2) have resided in Texas for at least ten (10) years.
- (3) achieve a minimum total score of 1000 on the new SAT using the Critical Reading and Math scores only, or composite 22 on the ACT.
- (4) rank in the upper one-half of high school graduating class.
- (5) be unable to attend college without financial assistance.
- (6) be planning to attend a state-supported or non-denominational college or university within the State of Texas.
- (7) be of good character.

AN APPLICANT NOT MEETING ALL ELIGIBILITY REQUIREMENTS WILL HAVE HIS/HER APPLICATION RETURNED WITHOUT PROCESSING.

PROCEDURES:

If all of the above criteria are met --

- (1) obtain an application from your High School Counselor.
- (2) complete your application and provide all necessary information as indicated.
- (3) submit your completed application with your high school transcript to the Baumberger Endowment office no later than February 15.
- (4) complete Financial Information Form attached to application and submit to the Baumberger Endowment office no later than February 15.

AN APPLICATION RECEIVED AFTER FEBRUARY 15 WILL BE RETURNED WITHOUT PROCESSING. AN APPLICATION RECEIVED WITHOUT ALL SUPPORTING DOCUMENTS WILL NOT BE RATED. AN ORIGINAL APPLICATION (NO PHOTOCOPIES OR FAXED COPIES) MUST BE SUBMITTED.

33rd ANNUAL



2011-2012

7201 Broadway • Suite 300

• San Antonio, Texas

78209

SCHOLARSHIP APPLICATION

High School Senior

ELIGIBILITY

To be eligible an applicant must:

1. be a graduating senior (Class of 2011) of an accredited (TEA) high school within Bexar County, Texas.
2. have resided in Texas for at least ten (10) years.
3. achieve a minimum total score of **1000** on the new SAT using the Critical Reading and Math scores **only**, or composite of **22** on the ACT.
4. rank in the upper one-half of high school graduating class.
5. be unable to attend college without financial assistance.
6. be planning to attend a **state-supported** or **non-denominational** college or university within the State of Texas.
7. be of good character.

DEADLINE DATES

1. Financial Information Form – Submit form with Scholarship Application to Baumberger office by **FEBRUARY 15**. (See instructions)
2. Application – Submit completed application to Baumberger office by **FEBRUARY 15**.
3. High School Transcript – Submit official copy with application to be received in Baumberger office by **FEBRUARY 15**. (See instructions)
4. Student applicant must assume the responsibility of submitting all materials prior to deadlines.

INSTRUCTIONS

1. Check with your Counselor to determine your eligibility as an applicant.
2. Submit an official transcript through the Fall term: include Spring courses in progress, if possible. Transcript should indicate **SAT or ACT scores**, **rank in class**, and **grade point average**.
Observe Deadline Date of February 15.
3. Complete a 2011-2012 Financial Information Form provided by Baumberger Endowment (attached to the back of this application).
4. Complete this application in pen or type. (Do not use a pencil.)
5. Take your time in completing this application, giving full consideration to each answer. Misleading information could cause a delay or disqualification.
6. Complete all items; leave no blanks. If an item is not applicable, write "n/a" or, if none, write "none."
7. Use last page for additional comments regarding your answers to any of the questions. Number your comments to correspond to the number of the question on the application.
8. Do not include pictures or letters of recommendation.
9. If you have any questions contact your high school counselor.
10. Forward your completed application and transcript to the **BAUMBERGER ENDOWMENT, 7201 BROADWAY, SUITE 300, SAN ANTONIO, TEXAS 78209** for arrival no later than **FEBRUARY 15**.

ANY APPLICATION RECEIVED AFTER FEBRUARY 15 OR ONE NOT MEETING ALL ELIGIBILITY REQUIREMENTS WILL BE RETURNED WITHOUT PROCESSING.
AN ORIGINAL APPLICATION (NO PHOTOCOPIES OR FAXED COPIES) MUST BE SUBMITTED.

PERSONAL DATA

1. _____
Last Name First Middle

2. _____
Permanent Address City Zip

3. _____
Telephone Number E-Mail Address Social Security Number

4. _____
High School Graduation Date

5. _____
High School Address City County Zip

6. What **state-supported** or eligible **non-denominational** college or university in the State of Texas do you wish to attend?

First Choice: _____

Second Choice: _____

7. Have you applied for admission? _____

8. Have you been accepted? _____

9. Do you plan to apply for financial assistance at your college or university? _____

(OFFICE USE ONLY)

() Application

() Rank

() Transcript

() Eligible Institution

() Residence

() FIF

() SAT Scores [must be listed on transcript or test page]

() ACT Scores [must be listed on transcript or test page]

Test Scores SAT (Verbal & Math Scores ONLY)		ACT	Rank in Class:	GPA:
Verbal: (Critical Reading)			Number in Class:	Scale:
Math: _____		By:		
Total: Composite:		Title:		

D. Educational Experience and Plans:

1. Name of high school attending. _____
2. Have you attended any other senior high schools? Yes () No () If yes, please explain where and why.

3. Have you ever been suspended or dismissed from any school? Yes () No () If yes, please explain.

4. What school activities, clubs, societies, and community organizations have you participated in including offices held during the past two years? (List honor societies under number 5.)

5. What honors have you earned in high school? _____

6. List courses in progress. _____

7. What is your anticipated academic major? _____
8. What is your primary career objective? _____

9. Do you think you will make any educational plans beyond earning your bachelor's degree? Yes () No () If yes, please explain. _____

E. Employment and Savings:

1. Are you presently employed? Yes () No () If yes, give a short resume of your duties, hours, and salary.

2. Did you work last summer? Yes () No () If yes, describe job, hours, and salary.

3. If you did not work, describe any activity or travel during the summer.

F. Character References: Do not include names of relatives or fellow students.

Name and Address	Occupation	Telephone No.
1. _____ _____ _____ _____	_____	_____
2. _____ _____ _____ _____	_____	_____
3. _____ _____ _____ _____	_____	_____

G. Certification by Student and Parents:

I hereby apply for a scholarship from the Baumberger Endowment to assist in the payment of my educational expenses while in full-time attendance at a state-supported or non-denominational college or university located in the State of Texas during the 2011-2012 academic year. I believe I qualify as a candidate for the scholarship and meet all of the eligibility requirements as specified on Page 1 of this application. The information submitted is true and correct to the best of my knowledge and belief. This certification is acknowledged by my parents.

Signature of Applicant

Date

Signature of Parent or Guardian

Date

(USE BACK PAGE FOR ADDITIONAL COMMENTS)

ADDITIONAL COMMENTS
(DO NOT include FIF information)

Number your comments to correspond to the number of the question on the application.

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



7201 Broadway • Suite 300 • San Antonio, Texas 78209

FINANCIAL INFORMATION FORM

Student Information

1. Student's Name: _____ Social Security #: _____
2. Address: _____ City: _____ State: _____ Zip: _____
3. Date of Birth: _____ Age: _____
4. Student's marital status (Check only one): _____ Unmarried _____ Married _____ Separated
5. Number of other dependents (**do not** include student or spouse): _____
(List "other dependents" and ages on Number 31)
6. Check any that are applicable to the student: _____ Ward _____ Orphan (Explain on Number 31)
7. Student's wages, salaries, tips, etc. (before taxes and deductions):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
8. Spouse's wages, salaries, tips, etc., if applicable, (before taxes and deductions):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
9. Other taxable income (or loss) (interest, dividends, etc.):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
10. Adjusted gross income (**Do not** include financial aid):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
11. Untaxed income and benefits (include Social Security, VA Benefits, etc.):
 - A. Calendar Year 2010 \$ _____
 - B. Estimated Summer 2011 (3 months) \$ _____
 - C. Estimated Academic Year 2011-2012 (9 months) \$ _____
12. U.S. Income Tax paid: Calendar Year 2010: \$ _____
13. Cash, savings, and checking accounts at present time (excluding scholarship/grant monies): \$ _____
14. Investments (stocks, bonds, etc.) (explain on Number 31): \$ _____

Parents Information

- 15.a. Father – Stepfather (circle one) wages, salaries, etc.:
 - A. 2009 \$ _____
 - B. Estimated 2010 \$ _____
 - C. Estimated 2011 \$ _____
- b. Mother – Stepmother (circle one) wages, salaries, etc.:
 - A. 2009 \$ _____
 - B. Estimated 2010 \$ _____
 - C. Estimated 2011 \$ _____
- c. Other taxable income (or loss) (interest, dividends, etc.):
 - A. 2009 \$ _____
 - B. Estimated 2010 \$ _____
 - C. Estimated 2011 \$ _____

16. Gross income: (Total sum of 15 a. b. c.)
A. 2009 \$ _____
B. Estimated 2010 \$ _____
C. Estimated 2011 \$ _____
17. Social Security benefits:
A. 2009 \$ _____
B. Estimated 2010 \$ _____
C. Estimated 2011 \$ _____
18. Other untaxed income (child support, welfare, veterans benefits, etc.):
A. 2009 \$ _____
B. Estimated 2010 \$ _____
C. Estimated 2011 \$ _____
19. Total U.S. income tax paid (including withholding): 2010 \$ _____
20. Medical and dental expenses not covered by insurance (Do not include insurance premiums): 2010 \$ _____
21. Number of dependent children in 2010 _____
22. Other unusual expenses (explain on Number 31): 2010 \$ _____
23. Cash, savings, and checking accounts at present time: \$ _____
24. Father – Stepfather (circle one)
Name: _____
Home Address: _____
Occupation/employer: _____
25. Mother – Stepmother (circle one)
Name: _____
Home Address: _____
Occupation/employer: _____
26. Parents current marital status: (circle one) Single/Never Married Married/Remarried Separated/Divorced Widowed
27. Date of Birth of older parent: _____
28. Total number of exemptions to be claimed on parents' 2010 U.S. income tax return: _____
29. Total size of parents' household during 2011-2012 academic year (include the student named on this form, parents, other dependent children, and other dependents): _____
30. Number of dependents in family, excluding parents, that will be in college at least half-time during 2011-2012 academic year: _____
31. Use this space to explain any unusual circumstances: _____

Certification and Authorization

I (We) declare that the information reported is true, correct, and complete. I (We) agree that, to verify information reported on this form, I (We) will, on request, provide the Baumberger Endowment with an official photocopy of my (our) 2010 U.S. income tax return. I (We) further agree to provide, if requested, any other official documentation to verify information reported.

Student's Telephone Number (_____) _____ Date: _____

Student's Signature _____

Spouse's Signature _____

Father's Signature _____

Mother's Signature _____