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Return of Private Foundation

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 The Sarah and Ross Perot, Jr. Foundation		A Employer identification number 43-1964344
Number and street (or P.O. box number if mail is not delivered to street address) P.O. Box 269014		B Telephone number 972/535-1900
City or town, state, and ZIP code Plano, TX 75026		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 18,420,540.	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
(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 <input type="checkbox"/>

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		1,261,059.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		365,672.	365,672.	365,672.	Statement 1
4 Dividends and interest from securities		256.	256.	256.	Statement 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		18,505.			
b Gross sales price for all assets on line 6a					
7 Capital gain net income (from Part IV, line 2)			18,505.		
8 Net short-term capital gain				N/A	
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income		3,186.	0.	3,186.	Statement 3
12 Total. Add lines 1 through 11		1,648,678.	384,433.	369,114.	
13 Compensation of officers, directors, trustees, etc.		0.	0.	0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees Stmt 4		100.	0.	0.	100.
17 Interest Stmt 5		3,512.	0.	0.	0.
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses Stmt 6		28,977.	18,018.	0.	10,959.
24 Total operating and administrative expenses. Add lines 13 through 23		32,589.	18,018.	0.	11,059.
25 Contributions, gifts, grants paid		7,435,306.			7,435,306.
26 Total expenses and disbursements. Add lines 24 and 25		7,467,895.	18,018.	0.	7,446,365.
27 Subtract line 26 from line 12		-5,819,217.			
a Excess of revenue over expenses and disbursements			366,415.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				369,114.	

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	25,462.	1,656.	1,656.
	2 Savings and temporary cash investments	6,562,958.	4,000,000.	4,000,000.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other Stmt 7	17,625,690.	14,393,237.	14,413,634.	
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe Statement 8)	5,250.	5,250.	5,250.	
16 Total assets (to be completed by all filers)	24,219,360.	18,400,143.	18,420,540.	
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			
	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 <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	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	24,219,360.	18,400,143.	
30 Total net assets or fund balances	24,219,360.	18,400,143.		
31 Total liabilities and net assets/fund balances	24,219,360.	18,400,143.		

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	24,219,360.
2 Enter amount from Part I, line 27a	2	-5,819,217.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	18,400,143.
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	18,400,143.

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 Petrus Short Term Fund LP 26-3724953			
b Petrus Short Term Fund LP 26-3724953			
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			11,543.
b			6,962.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			11,543.
b			6,962.
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	18,505.
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	11,543.

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	2,704,884.	10,096,646.	.267899
2008	1,319,637.	1,932,491.	.682868
2007	1,192,231.	761,435.	1.565769
2006	682,276.	1,659,485.	.411137
2005	719,145.	123,252.	5.834753

2 Total of line 1, column (d)	2	8.762426
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	1.752485
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	21,508,894.
5 Multiply line 4 by line 3	5	37,694,014.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,664.
7 Add lines 5 and 6	7	37,697,678.
8 Enter qualifying distributions from Part XII, line 4	8	7,446,365.

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 <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter. _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	7,328.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)	2	0.
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	3	7,328.
3	Add lines 1 and 2	4	0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	5	7,328.
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	1,800.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	5,528.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d	7	7,328.
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> 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	0.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2011 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b 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
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2	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	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
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	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?	6	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.	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> TX		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	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	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses Stmt 9	10	X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see 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 ▶ N/A	13	X	
14	The books are in care of ▶ J.Y. Robb III Telephone no ▶ 972/535-1930 Located at ▶ 2300 W. Plano Parkway Plano, TX ZIP+4 ▶ 75075			
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b 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 ▶ <input type="checkbox"/>	1b	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?	1c	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 ▶	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	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 ▶		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b 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	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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?		4b

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

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

6b

X

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

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Henry Ross Perot, Jr. P.O. Box 269014 Plano, TX 75026	Trustee, Vice President/Tr	0.00	0.	0.
Sarah F. Perot P.O. Box 269014 Plano, TX 75026	Trustee, President/Sec.	20.00	0.	0.
Darcy Glen Anderson P.O. Box 269014 Plano, TX 75026	Trustee	0.00	0.	0.
J. Y. Robb III P.O. Box 269014 Plano, TX 75026	Trustee, Asst. Secretary	0.00	0.	0.

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

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

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

0

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

(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 The Foundation makes grants to other organizations to assist them in conducting their direct charitable activities.	0.
2 The Foundation provides assistance and scholarships to unrelated individuals who are eligible recipients.	0.
3 The Foundation provides assistance to other indigent individuals.	0.
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

Form 990-PF (2010)

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	21,793,537.
b	Average of monthly cash balances	1b	37,654.
c	Fair market value of all other assets	1c	5,250.
d	Total (add lines 1a, b, and c)	1d	21,836,441.
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	21,836,441.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	327,547.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	21,508,894.
6	Minimum investment return. Enter 5% of line 5	6	1,075,445.

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	1,075,445.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	7,328.
b	Income tax for 2010 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	7,328.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,068,117.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,068,117.
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	1,068,117.

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	7,446,365.
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	7,446,365.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	7,446,365.

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 instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				1,068,117.
2 Undistributed Income, if any, as of the end of 2010			0.	
a Enter amount for 2009 only				
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2010.				
a From 2005	712,983.			
b From 2006	599,334.			
c From 2007	1,154,166.			
d From 2008	1,223,028.			
e From 2009	2,201,800.			
f Total of lines 3a through e	5,891,311.			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 7,446,365.			0.	
a Applied to 2009, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2010 distributable amount				1,068,117.
e Remaining amount distributed out of corpus	6,378,248.			
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:	12,269,559.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	712,983.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	11,556,576.			
10 Analysis of line 9				
a Excess from 2006	599,334.			
b Excess from 2007	1,154,166.			
c Excess from 2008	1,223,028.			
d Excess from 2009	2,201,800.			
e Excess from 2010	6,378,248.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities

Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon.

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see 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))

See Statement 10

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

None

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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

Kristen Garcia, 214-528-2225

5500 Preston Road, Suite 365, Dallas, TX 75205

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

Letter

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:

None

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 Attached Schedule				
Total ▶ 3a 7435306.				
b <i>Approved for future payment</i>				
None				
Total ▶ 3b 0.				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion 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	365,672.	
4 Dividends and interest from securities			14	256.	
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					3,186.
8 Gain or (loss) from sales of assets other than inventory			18	18,505.	
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.		384,433.	3,186.
13 Total. Add line 12, columns (b), (d), and (e)					387,619.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

2010

Name of the organization

The Sarah and Ross Perot, Jr. Foundation

Employer identification number

43-1964344

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 on line H 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).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

Name of organization

Employer identification number

The Sarah and Ross Perot, Jr. Foundation

43-1964344

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	SFP, Inc. P.O. Box 269014 Plano, TX 75026	\$ 11,059.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2	Henry Ross Perot, Jr. P.O. Box 269014 Plano, TX 75026	\$ 1,250,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Employer identification number

43-1964344

[illegible]

Name of organization

Employer identification number

The Sarah and Ross Perot, Jr. Foundation

43-1964344

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	Amount
Bank of America	12.
Mellon Bank	113,252.
Petrus Short Term Fund LP 26-3724953	252,408.
Total to Form 990-PF, Part I, line 3, Column A	365,672.

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
Petrus Short Term Fund LP 26-3724953	256.	0.	256.
Total to Form 990-PF, Part I, line 4	256.	0.	256.

Form 990-PF Other Income Statement 3

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Tax Exempt Income	3,186.	0.	3,186.
Total to Form 990-PF, Part I, line 11	3,186.	0.	3,186.

Form 990-PF Other Professional Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Consulting Expense	100.	0.	0.	100.
To Form 990-PF, Pg 1, line 16c	100.	0.	0.	100.

Form 990-PF	Taxes	Statement	5
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Federal Income Tax	3,512.	0.	0.	0.
To Form 990-PF, Pg 1, ln 18	3,512.	0.	0.	0.

Form 990-PF	Other Expenses	Statement	6
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Petrus Short Term Fund LP 26-3724953	18,017.	18,017.	0.	0.
Investment Expenses	1.	1.	0.	0.
Rent Expense	7,078.	0.	0.	7,078.
Office Expense	1,621.	0.	0.	1,621.
Utility Expense	2,060.	0.	0.	2,060.
Insurance Expense	200.	0.	0.	200.
To Form 990-PF, Pg 1, ln 23	28,977.	18,018.	0.	10,959.

Form 990-PF	Other Investments	Statement	7
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Description	Valuation Method	Book Value	Fair Market Value
Investment in Petrus Short Term Fund LP	COST	14,393,237.	14,413,634.
Total to Form 990-PF, Part II, line 13		14,393,237.	14,413,634.

Form 990-PF	Other Assets	Statement	8
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Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
Organizational Costs	5,250.	5,250.	5,250.
To Form 990-PF, Part II, line 15	5,250.	5,250.	5,250.

Form 990-PF	List of Substantial Contributors Part VII-A, Line 10	Statement	9
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Name of Contributor	Address
SFP, Inc.	P.O. Box 269014 Plano, TX 75026

Form 990-PF	Part XV - Line 1a List of Foundation Managers	Statement	10
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Name of Manager
Henry Ross Perot, Jr. Sarah F. Perot

The Sarah and Ross Perot, Jr. Foundation
EIN 43-1964344
2010

Form 990-PF
Part XV, Line 3- Contributions, Gifts, Grants Paid

Date	Recipient & Address	Relationship to Fund Manager or Contributor	Organization Status	Purpose of Grant	Amount
1/5/2010	East West Institute 11 East 26th Street 20F New York NY 10010	None	Public Charity - as described in Section 509(a)(2)	Non-partisan Group Addressing Global Issues	300,000 00
1/8/2010	Highland Park Presbyterian Church 3821 University Blvd Dallas, Texas 75205	None	Public Charity - as described in Section 509(a)(1)	Disaster Relief Fund	12,500 00
1/8/2010	The University of Texas at Austin Lady Bird Johnson Wildflower Center 4801 La Crosse Avenue Austin, TX 78739	None	Public Charity - as described in Section 509(a)(1)	Programs for Conserving Native Plants and Addressing Ecological Problems	1,500 00
1/15/2010	CONTACT Crisis Line P O Box 800742 Dallas, Texas 75380	None	Public Charity - as described in Section 509(a)(2)	Support for Crisis Help Line Providing Emergency Assistance and Outreach	5,000 00
1/15/2010	Church of the Incarnation 3966 McKinney Ave Dallas, TX	None	Public Charity - as described in Section 509(a)(1)	Providing Disaster Relief to Support the Haiti Recovery Efforts	5,000 00
1/22/2010	The University of Texas MD Anderson Cancer Center 1515 Holcombe Blvd Houston, TX 77030	None	Public Charity - as described in Section 509(a)(1)	Cancer Care, Research, Education and Prevention	500 00
1/22/2010	Museum of Modern Art 11 West 53rd Street New York, NY 10019	None	Public Charity - as described in Section 509(a)(1)	Support for Library Council	2,000 00
1/22/2010	Jarvis Christian College/Dallas Alumni P O Box 1470/Highway 80 Hawkins, Texas 75765	None	Public Charity - as described in Section 509(a)(1)	Education Support for College Applicant Assistance	100 00
2/8/2010	Dallas Symphony Orchestra 2301 Flora Street Dallas, TX 75201	None	Public Charity - as described in Section 509(a)(1)	Support for the Performing Arts	50,000 00
2/16/2010	AT&T Performing Arts Center 2100 Ross Ave Suite 650 Dallas, Texas 75201	None	Public Charity - as described in Section 509(a)(1)	Support for the Performing Arts	40,000 00
2/19/2010	Papageno Foundation P O Box 192527 Dallas, Texas 75219	None	Public Charity - as described in Section 509(a)(2)	Support for Children with Autism	500 00
2/19/2010	UT Southwestern Medical Center 5323 Harry Hines Blvd Dallas, Texas 75390	None	Public Charity - as described in Section 509(a)(1)	Medical Research	1,000 00
2/19/2010	National Multiple Sclerosis Society 8111 N Stadium Dr, Suite 100 Houston, TX 77054	None	Public Charity - as described in Section 509(a)(1)	Medical Research	250 00
2/19/2010	Limbs for Life Foundation	None	Public Charity - as	Provide Comfortable &	2,500 00

	218 East Main Street Oklahoma City, OK 73104		described in Section 509(a)(2)	Full Functional Prosthetic Care	
3/8/2010	American Hospital of Paris Foundation 575 Madison Avenue, 10th Floor New York, NY 10022	None	Public Charity - as described in Section 509(a)(1)	Raise Awareness for U S Hospitals in Paris	1,000 00
3/8/2010	Texas Cultural Trust 823 Congress Avenue, Suite 650 Austin, TX 78701	None	Public Charity - as described in Section 509(a)(2)	Support of the Arts in Texas	1,000 00
3/8/2010	The Blair House Restoration Fund Post Office 27208 Washington, DC 20038	None	Public Charity - as described in Section 509(a)(2)	Provide Renovation Support to Housing Used by Foreign Persons when Visiting the U S	5,000 00
3/8/2010	African PHA Foundation 4 Ashington Club Road Far Hills, NJ 07931	None	Public Charity - as described in Section 509(a)(2)	Provide Support in the Conservation of the Flora and Human Habitat of Africa	1,000 00
3/8/2010	United Way of Metropolitan Dallas 1800 N Lamar Dallas, TX 75202	None	Public Charity - as described in Section 509(a)(1)	Provide Aid for the Needs of the Community	15,000 00
3/8/140	Highland Park Presbyterian Church 3821 University Blvd Dallas, Texas 75205	None	Public Charity - as described in Section 509(a)(1)	Missions and Operating Budget	62,500 00
4/5/2010	Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity - as described in Section 509(a)(1)	Meadows School of the Arts Support	240 00
4/5/2010	Habitat for Humanity 2800 N Hampton Road Dallas, TX 75212	None	Public Charity - as described in Section 509(a)(1)	Create Affordable Homeownership Opportunities for Qualifying Families	1,000 00
4/5/2010	Genesis Women's Shelter 4411 Lemmon Avenue, Suite 201 Dallas, Texas 75219	None	Public Charity - as described in Section 509(a)(2)	Programs for Victims of Domestic Violence	500 00
4/12/2010	Highland Park Presbyterian Church 3821 University Blvd Dallas, Texas 75205	None	Public Charity - as described in Section 509(a)(1)	Missions and Operating Budget	12,500 00
4/12/2010	Metro Dallas Homeless Alliance 1818 Corsicana Street Dallas, TX 75201	None	Public Charity - as described in Section 509(a)(2)	Provide Food and Shelter to Homeless People	20,000 00
4/16/2010	Marshall Assembly of God Church 200 Westwood Drive Marshall, Arkansas 72650	None	Public Charity - as described in Section 509(a)(1)	Provide Spiritual Support	1,000 00
4/16/2010	La Fiesta de las Seis Banderas 5307 E Mockingbird Lane, Suite 200 Dallas, TX 75206	None	Public Charity - as described in Section 509(a)(2)	Provide Support to Outstanding Young People and Benefit Local Schools	5,000 00
4/26/2010	Conservation Force 3240 S I-10 Service Rd Suite 200 Metairie, Louisiana 70001	None	Public Charity - as described in Section 509(a)(2)	Promote Wildlife Conservation	75,000 00
4/26/2010	Anti-Defamation League 605 3rd Avenue New York, NY 10158	None	Public Charity - as described in Section 509(a)(2)	Discourage Harassment and Discrimination Around the World	4,000 00
4/26/2010	American Diabetes Association P O Box 11454 Alexandria, VA 22312	None	Public Charity - as described in Section 509(a)(1)	Medical Research	500 00
5/3/2010	Texas Christian University 3301 Bellaire Drive North Fort Worth, TX 76129	None	Public Charity - as described in Section 509(a)(1)	Funding for the Further Education and Development	2,500,000 00

5/4/2010	Camp John Marc 2824 Swiss Avenue Dallas, Texas 75204	None	Public Charity - as described in Section 509(a)(2)	Camps for special Needs Children	5,000 00
5/4/2010	Southern Methodist University P O Box 750402 Dallas, Texas 75275	None	Public Charity - as described in Section 509(a)(1)	Meadows School of the Arts Support	5,000 00
5/4/2010	Southern Methodist University P O Box 750402 Dallas, Texas 75275	None	Public Charity - as described in Section 509(a)(1)	Meadows School of the Arts Support	5,000 00
5/10/2010	Brother Bill's Helping Hand 3430 Odessa Street Dallas, Texas 75212	None	Public Charity - as described in Section 509(a)(2)	Provides Education, Health and Life Essential Support to West Dallas Citizens	25,000 00
5/10/2010	The University of Texas MD Anderson Cancer Center P O Box 301439 Houston, TX 77230	None	Public Charity - as described in Section 509(a)(1)	Cancer Care, Research, Education and Prevention	5,000 00
5/10/2010	Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity - as described in Section 509(a)(1)	Meadows School of the Arts Support	50,000 00
5/12/2010	Vanderbilt University PMB 407727 2301 Vanderbilt Place Nashville, TN 37235	None	Public Charity - as described in Section 509(a)(1)	Education Support Funding	5,000 00
5/14/2010	Alzheimer's Association 4144 North Central Expressway, Suite 750 Dallas, Texas 75204	None	Public Charity - as described in Section 509(a)(1)	Medical Research	500 00
5/14/2010	The Blair House Restoration Fund Post Office 27208 Washington, DC 20038	None	Public Charity - as described in Section 509(a)(2)	Provide Renovation Support to Housing Used by Foreign Persons when Visiting the U S	30,000 00
5/24/2010	The Global Fund for Children 1101 14th St, NW, Suite 420 Washington, DC 20005	None	Public Charity - as described in Section 509(a)(2)	Programs to Advance the Dignity of Children Around the World	50,000 00
6/1/2010	Janece Bueche 3826 Deep Valley Court Plano, TX 75023	None	N/A	Provide Medical Rehabilitation Assistance for Injuries Sustained	10,000 00
6/14/2010	St Mark's School of Texas 10600 Preston Road Dallas, Texas 75230	None	Public Charity - as described in Section 509(a)(1)	Building Campaign	1,250,000 00
6/1/2010	West Dallas Community School 2215 Canada Drive Dallas, TX 75212	None	Public Charity - as described in Section 509(a)(1)	Support for Ministry Programs	5,000 00
6/1/2010	St Mark's School of Texas 10600 Preston Road Dallas, Texas 75230	None	Public Charity - as described in Section 509(a)(1)	Annual Operating Expenses	50,000 00
6/1/2010	Cystic Fibrosis Foundation 2929 Carlisle, Suite 230 Dallas, TX 75204	None	Public Charity - as described in Section 509(a)(1)	Medical Research	500 00
6/1/2010	The Crystal Charity Ball 30 Highland Park Village, Ste 206 Dallas, TX 75205	None	Public Charity - as described in Section 509(a)(2)	Aid & Support to Children's Charities in Dallas County	10,000 00
6/2/2010	Gallagher's Army P O Box 190665 Dallas, TX 75219	None	Public Charity - as described in Section 509(a)(2)	Provide Support to the Families of Fallen Police Officers	25,000 00
6/7/2010	Treasure Street	None	Public Charity - as	Texas Scottish Rite Hospital	15,000 00

	2222 Wellborn Street Dallas, Texas 75219		described in Section 509(a)(2)	Service to Handicapped Children	
6/7/2010	Presbyterian Children's Home & Services 4407 Bee Cave Rd., Suite 100 Austin, TX 78746	None	Public Charity - as described in Section 509(a)(1)	Ministry to Children Suffering from Abuse, Abandonment & Hardship	1,000 00
6/7/2010	Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity - as described in Section 509(a)(1)	Education Support Funding	100,000 00
6/7/2010	Project Hope Millwood, Virginia 22646	None	Public Charity - as described in Section 509(a)(2)	Provide Support to Families of the U S Navy	10,000 00
6/7/2010	Education is Freedom 2711 N Haskell Ave Suite 2070 LB18 Dallas, Texas 75204	None	Public Charity - as described in Section 509(a)(2)	Support for the Center of Education & Wildlife Conservation	25,000 00
7/12/2010	Highland Park Presbyterian Church 3821 University Blvd Dallas, Texas 75205	None	Public Charity - as described in Section 509(a)(1)	Missions and Operating Budget	12,500 00
7/12/2010	Highland Park Presbyterian Church 3821 University Blvd Dallas, Texas 75205	None	Public Charity - as described in Section 509(a)(1)	Missions and Operating Budget	62,500 00
7/19/2010	Kyser Miree Memorial Fund Vanderbilt University PMB 407727 2301 Vanderbilt Place Nashville, TN 37240-7727	None	Public Charity - as described in Section 509(a)(1)	Education Support Funding	5,000 00
7/19/2010	Dallas Pregnancy Resource Center 12959 Jupiter Road Suite 260 Dallas, Texas 75238	None	Public Charity - as described in Section 509(a)(2)	Assistance to Women Facing Unplanned Pregnancies	500 00
7/19/2010	Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity - as described in Section 509(a)(1)	Education Support	1,500 00
7/19/2010	The Senior Source 3910 Harry Hines Blvd Dallas, Texas 75219	None	Public Charity - as described in Section 509(a)(2)	Promote the Improvement of Quality of Life for the Elderly	5,000 00
8/9/2010	West Dallas Community School 2215 Canada Drive Dallas, TX 75212	None	Public Charity - as described in Section 509(a)(1)	2010 Building Fund	30,000 00
8/9/2010	West Dallas Community School 2215 Canada Drive Dallas, TX 75212	None	Public Charity - as described in Section 509(a)(1)	2010 School Bus Fund	6,000 00
8/9/2010	Council on Foreign Relations 58 East 68th Street New York, NY 10065	None	Public Charity - as described in Section 509(a)(1)	Promote the Education of Foreign Policy and World Affairs	8,333 00
8/16/2010	Living Water International P O Box 35496 Houston, TX 77235	None	Public Charity - as described in Section 509(a)(2)	Providing Clean Water to Needy Communities	10,000 00
8/27/2010	Boy Scouts Circle Ten Council 8605 Harry Hines Blvd Dallas, Texas 75235	None	Public Charity - as described in Section 509(a)(2)	Provide Programs to Scouts	15,000 00
8/27/2010	Dallas Symphony Orchestra 2301 Flora Street Dallas, TX 75201	None	Public Charity - as described in Section 509(a)(1)	Support for the Performing Arts	10,000 00
9/3/2010	Texas State History Museum P O Box 12874	None	Public Charity - as described in	Efforts to Further the Appreciation and Teaching of	25,000 00

	Austin, TX 78711		Section 509(a)(1)	Texas History	
9/3/2010	Lee Park and Arlington Hall P O Box 190872 Dallas, Texas	None	Public Charity - as described in Section 509(a)(2)	Promote the Preservation and Enhancement of Lee Park	1,000 00
9/3/2010	Visiting Nurse Association 1440 West Mockingbird Dallas, TX 75247	None	Public Charity - as described in Section 509(a)(2)	Programs to Provide Care and Meals to Elderly, Ill or Disabled	1,000 00
9/3/2010	Dallas Museum of Art 1717 North Harwood Dallas, TX 75201	None	Public Charity - as described in Section 509(a)(1)	Support for Museum Art Programs	2,500 00
9/3/2010	Council for Life 4516 Lovers Lane PMB 103 Dallas, Texas 75225	None	Public Charity - as described in Section 509(a)(2)	Programs to Raise Public Awareness of Issues of Unplanned Pregnancies	1,000 00
10/5/2010	St Philip's School and Community Center 1600 Pennsylvania Avenue Dallas, Texas 75215	None	Public Charity - as described in Section 509(a)(1)	Tuition and Social Services to Needy Students	1,000 00
10/5/2010	The Salvation Army 8787 N Stemmons Freeway Suite 800 Dallas Texas 75247	None	Public Charity - as described in Section 509(a)(1)	Programs to Meet Human Needs in the Community	100,000 00
10/5/2010	Museum of Nature & Science PO Box 151469 Dallas, TX 75315	None	Public Charity - as described in Section 509(a)(1)	Education Programs	25,000 00
10/11/2010	Northwood University 4000 Whiting Drive Midland, MI 48640	None	Public Charity - as described in Section 509(a)(1)	Education Support Funding	500 00
10/11/2010	Joe Foss Institute 14415 North 73rd Street Suite 109 Scottsdale, AZ 85260	None	Public Charity - as described in Section 509(a)(2)	Programs to Inspire Patriotism, Public Service & Appreciation for America's Freedoms	25,000 00
10/11/2010	Highland Park Presbyterian Church 3821 University Blvd Dallas, Texas 75205	None	Public Charity - as described in Section 509(a)(1)	Missions and Operating Budget	62,500 00
10/11/2010	Highland Park Presbyterian Church 3821 University Blvd Dallas, Texas 75205	None	Public Charity - as described in Section 509(a)(1)	Missions and Operating Budget	12,500 00
10/18/2010	United Way of Metropolitan Dallas 1800 N Lamar Dallas, TX 75202	None	Public Charity - as described in Section 509(a)(1)	Provide Aid for the Needs of the Community	15,000 00
10/18/2010	Baylor Healthcare System Foundation 3600 Gaston Avenue Suite 100 Dallas, Texas	None	Public Charity - as described in Section 509(a)(1)	Medical Research	2,500 00
10/18/2010	Turtle Creek Recovery Center 2820 Swiss Avenue Dallas, Texas 75204	None	Public Charity - as described in Section 509(a)(2)	Provide Support to People Suffering from Mental Illness	1,000 00
10/18/2010	Southwestern Medical Foundation 2305 Cedar Springs Road, Suite 150 Dallas, Texas 75201	None	Public Charity - as described in Section 509(a)(1)	Medical Research	5,000 00
11/1/2010	Texas Discovery Gardens 3601 Martin Luther King Jr Blvd Dallas, Texas 75210	None	Public Charity - as described in Section 509(a)(2)	Promote the Preservation of Organic Gardening	1,000 00
11/1/2010	George Bush Presidential Library 1725 Lakepointe Drive Lewisville, TX 75057	None	Public Charity - as described in Section 509(a)(1)	Provide Education of Historical Records for Viewing by the Public	2,500 00
11/1/2010	The Sweetheart Ball	None	Public Charity - as	Medical Research	15,000 00

	Communities Foundation of Texas 5500 Caruth Haven Lane Dallas, TX 75225		described in Section 509(a)(2)		
11/9/2010	Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity - as described in Section 509(a)(1)	Education Research Funding	10,000 00
11/9/2010	Theta Parents Club 1206 Chickering Road Nashville, TN 37215	None	Public Charity - as described in Section 509(a)(2)	Providing Educational and Social Support Services	1,000 00
11/15/2010	Dallas Zoological Society 650 S RL Thornton Freeway Dallas, Texas 75203	None	Public Charity - as described in Section 509(a)(2)	Support for the Center of Education & Wildlife Conservation	2,500 00
11/15/2010	North Texas Food Bank 4500 S Cockrell Hill Road Dallas, TX 75236	None	Public Charity - as described in Section 509(a)(1)	Promote the Pursuit of a Hunger Free Community	10,000 00
11/22/2010	Volunteer Center of North Texas 2800 Live Oak Dallas, Texas 75204	None	Public Charity - as described in Section 509(a)(2)	Provides Donated Time and Materials to North Texas nonprofits	2,500 00
11/29/2010	Dallas Symphony Orchestra 2301 Flora Street Dallas, TX 75201	None	Public Charity - as described in Section 509(a)(1)	Support for the Performing Arts	300 00
12/14/2010	Vanderbilt University 2301 Vanderbilt Place Nashville, TN 37240	None	Public Charity - as described in Section 509(a)(1)	Funding to Provide Scholarship Opportunities to Future Students	1,500,000 00
12/6/2010	The University of Texas MD Anderson Cancer Center PO Box 301439 Houston, TX 77230	None	Public Charity - as described in Section 509(a)(1)	Cancer Care, Research, Education and Prevention	250 00
12/6/2010	The Global Fund for Children 1101 14th St, NW, Suite 420 Washington, DC 20005	None	Public Charity - as described in Section 509(a)(2)	Programs to Advance the Dignity of Children Around the World	50,000 00
12/6/2010	Highland Park Presbyterian Church 3821 University Blvd Dallas, Texas 75205	None	Public Charity - as described in Section 509(a)(1)	Missions and Operating Budget	62,500 00
12/6/2010	The Global Fund for Children 1101 14th St, NW, Suite 420 Washington, DC 20005	None	Public Charity - as described in Section 509(a)(2)	Programs to Advance the Dignity of Children Around the World	100,000 00
12/6/2010	George W Bush Foundation P O Box 600610 Dallas, TX 75206	None	Public Charity - as described in Section 509(a)(1)	Provide Education and Promote the Advancement of Public Service in Today's Youth	333,333 00
12/6/2010	Dallas Symphony Orchestra 2301 Flora Street Dallas, TX 75201	None	Public Charity - as described in Section 509(a)(1)	Support for the Performing Arts	50,000 00
12/13/2010	James Madison Council Library of Congress 101 Independence Ave, S E Washington, D C 20540-1400	None	Public Charity - as described in Section 509(a)(2)	Promote Education and Awareness about the Library of Congress	25,000 00
12/13/2010	Dallas Museum of Art 1717 North Harwood Dallas, TX 75201	None	Public Charity - as described in Section 509(a)(1)	Support for Museum Art Programs	10,000 00
12/13/2010	Southern Methodist University PO Box 750402	None	Public Charity - as described in	Education and Scholarship Support Funding	1,500 00

	Dallas, TX 75275		Section 509(a)(1)		
12/20/2010	Museum of Modern Art 11 West 53rd Street New York, NY 10019	None	Public Charity - as described in Section 509(a)(1)	Support for Library Council	2,000 00
12/20/2010	Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity - as described in Section 509(a)(1)	Education and Scholarship Support Funding	1,000 00
TOTAL CONTYRIBUTIONS, GIFTS, GRANTS PAID					<u><u>7,435,306.00</u></u>

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

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

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

Part II	Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).	
Type or print File by the extended due date for filing your return. See instructions.	Name of exempt organization	Employer identification number
	The Sarah and Ross Perot, Jr. Foundation	43-1964344
	Number, street, and room or suite no. If a P.O. box, see instructions. P.O. Box 269014	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. Plano, TX 75026	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

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

J.Y. Robb III

- The books are in the care of ☒ 2300 W. Plano Parkway Plano, TX - 75075

Telephone No. ☒ 972/535-1930

FAX No. ☐

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

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

4 I request an additional 3-month extension of time until November 15, 2011.

5 For calendar year 2010, or other tax year beginning , and ending .

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return

☐ Change in accounting period

7 State in detail why you need the extension

Taxpayer has not received the information from an outside investment necessary to file a complete tax return.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	7,328.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	7,328.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification

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

Signature ☐

Title ☐

Date ☐

Form 8868 (Rev. 1-2011)