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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning 01-01-2010 , and ending 12-31-2010

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
DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION

A Employer identification number
52-2380006

Number and street (or P O box number if mail is not delivered to street address)
40 NE LOOP 410 SUITE 200

Room/suite

B Telephone number (see page 10 of the instructions)
(210) 342-8000

City or town, state, and ZIP code
SAN ANTONIO, TX 78216

C If exemption application is pending, check here ☐
D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)
\$ 2,619,587

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

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	57,500			
	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.	61,604	61,604		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	109,042			
	b Gross sales price for all assets on line 6a <u>1,073,164</u>				
	7 Capital gain net income (from Part IV , line 2)		109,042		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	1,389	1,389		
	12 Total. Add lines 1 through 11	229,535	172,035		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	20,950	10,475		10,475
	c Other professional fees (attach schedule)	23,879	23,879		0
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	3,225	485		0
	19 Depreciation (attach schedule) and depletion	178	178		
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications	98	0		98
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	48,330	35,017		10,573
	25 Contributions, gifts, grants paid	95,255			95,255
	26 Total expenses and disbursements. Add lines 24 and 25	143,585	35,017		105,828
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	85,950			
	b Net investment income (if negative, enter -0-)		137,018		
	c Adjusted net income (if negative, enter -0-)				

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

Cat No 11289X

Form **990-PF** (2010)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	120,212	160,864	160,864
	3	Accounts receivable ▶ <u>64</u>			
		Less allowance for doubtful accounts ▶ _____	70	64	64
	4	Pledges receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	1,426		
	10a	Investments—U S and state government obligations (attach schedule)	344,528	☒ 344,385	358,823
	b	Investments—corporate stock (attach schedule)	1,415,183	☒ 1,524,497	1,851,415
	c	Investments—corporate bonds (attach schedule).	283,081	☒ 222,869	233,619
	11	Investments—land, buildings, and equipment basis ▶ _____			
	Less accumulated depreciation (attach schedule) ▶ _____				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)	18,304	☒ 17,383	14,802	
14	Land, buildings, and equipment basis ▶ _____				
	Less accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,182,804	2,270,062	2,619,587	
Liabilities	17	Accounts payable and accrued expenses		1,308	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	1,308	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	2,182,804	2,182,804	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	0	85,950	
	30	Total net assets or fund balances (see page 17 of the instructions)	2,182,804	2,268,754	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,182,804	2,270,062	

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 2,182,804
2	Enter amount from Part I, line 27a	2 85,950
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 2,268,754
5	Decreases not included in line 2 (itemize) ▶ _____	5 0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 2,268,754

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	PUBLICLY TRADED SECURITIES BRINKER ST	P		
b	PUBLICLY TRADED SECURITIES BRINKER LT	P		
c	PUBLICLY TRADED SECURITIES FNB	P		
d	PUBLICLY TRADED SECURITIES FNB	P		
e	LITIGATION PROCEEDS MERRILL LYNCH	P		

(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 681,580		613,298	68,282
b 115,830		99,190	16,640
c 64,977		65,192	-215
d 210,417		186,442	23,975
e 360			360

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) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			68,282
b			16,640
c			-215
d			23,975
e			360

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	109,042
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	123,215	2,132,023	0 057793
2008	371,272	2,375,704	0 156279
2007	260,021	2,646,526	0 098250
2006	159,502	1,701,514	0 093741
2005	130,114	1,642,239	0 079230

2 Total of line 1, column (d).	2	0 485293
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 097059
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5.	4	2,374,862
5 Multiply line 4 by line 3.	5	230,502
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,370
7 Add lines 5 and 6.	7	231,872
8 Enter qualifying distributions from Part XII, line 4.	8	105,828

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)			
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	2,740
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3 Add lines 1 and 2.		3	2,740
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	2,740
6 Credits/Payments			
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	1,429
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	3,000
d	Backup withholding erroneously withheld	6d	
7 Total credits and payments Add lines 6a through 6d.		7	4,429
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	1,689
11 Enter the amount of line 10 to be Credited to 2011 estimated tax 1,689 Refunded		11	0

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?			Yes No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		1a 1b	No No
c Did the foundation file Form 1120-POL for this year?.		1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0 (2) On foundation managers \$ 0			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?.		4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) 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	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10	No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of RUTH EILENE BUTLER SULLIVAN Telephone no (210) 342-8000 Located at 40 N E LOOP 410 SUITE 200 SAN ANTONIO TX ZIP+4 78216			
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	
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?	16		No
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.				

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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 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 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
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.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes	☒ No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☒ No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes	☒ No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).	☐ Yes	☒ No	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes	☒ No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	5b		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	2,313,538
b	Average of monthly cash balances.	1b	97,489
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,411,027
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	2,411,027
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	36,165
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,374,862
6	Minimum investment return. Enter 5% of line 5.	6	118,743

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	118,743
2a	Tax on investment income for 2010 from Part VI, line 5.	2a	2,740
b	Income tax for 2010 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,740
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	116,003
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	116,003
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	116,003

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	105,828
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	105,828
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	105,828
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1		Distributable amount for 2010 from Part XI, line 7			
2		Undistributed income, if any, as of the end of 2010			
a		Enter amount for 2009 only. 0			
b		Total for prior years 20__ , 20__ , 20__ 0			
3		Excess distributions carryover, if any, to 2010			
a		From 2005. 50,432			
b		From 2006. 78,798			
c		From 2007. 132,921			
d		From 2008. 253,269			
e		From 2009. 17,434			
f		Total of lines 3a through e. 532,854			
4		Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 105,828			
a		Applied to 2009, but not more than line 2a 0			
b		Applied to undistributed income of prior years (Election required—see page 26 of the instructions) 0			
c		Treated as distributions out of corpus (Election required—see page 26 of the instructions). . . 0			
d		Applied to 2010 distributable amount. 105,828			
e		Remaining amount distributed out of corpus 0			
5		Excess distributions carryover applied to 2010 10,175 10,175			
		(If an amount appears in column (d), the same amount must be shown in column (a).)			
6		Enter the net total of each column as indicated below:			
a		Corpus Add lines 3f, 4c, and 4e Subtract line 5 522,679			
b		Prior years' undistributed income Subtract line 4b from line 2b. 0			
c		Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. 0			
d		Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . . 0			
e		Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions 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) (see page 27 of the instructions) 0			
8		Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions) 40,257			
9		Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a 482,422			
10		Analysis of line 9			
a		Excess from 2006. 78,798			
b		Excess from 2007. 132,921			
c		Excess from 2008. 253,269			
d		Excess from 2009. 17,434			
e		Excess from 2010.			

Part XIV

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

1a

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

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2010	(b) 2009	(c) 2008	(d) 2007	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

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

RUTH EILENE BUTLER SULLIVAN

b

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

2

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

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

a

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

b

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

c

Any submission deadlines

d

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

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	95,255
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	61,604	
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.			14	1,389	
8 Gain or (loss) from sales of assets other than inventory			18	109,042	
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		172,035	0
13 Total. Add line 12, columns (b), (d), and (e).			13	172,035	172,035

[illegible]

Part XVII

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

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1

Cash.

2

Other assets.

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

2

Purchases of assets from a noncharitable exempt organization.

3

Rental of facilities, equipment, or other assets.

4

Reimbursement arrangements.

5

Loans or loan guarantees.

6

Performance of services or membership or fundraising solicitations.

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d

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

Yes

No

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

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

Yes

No

b

If "Yes," complete the following schedule.

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

Sign Here

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

2011-11-11

Signature of officer or trustee

Date

Title

Paid Preparer's Use Only

Preparer's Signature	Date	Check if self-employed	PTIN
Firm's name	BDO USA LLP	Firm's EIN	
Firm's address	40 NE LOOP 410 SUITE 200 SAN ANTONIO, TX 782165876	Phone no	(210) 342-8000

Form 990-PF (2010)

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 organization DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION	Employer identification number 52-2380006
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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 33¹/₃% 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 lin 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)

Name of organization DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION	Employer identification number 52-2380006
---	---

Part I

Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	RUTH EILENE BUTLER SULLIVAN 200 PATTERSON APT 200 SAN ANTONIO, TX 78209	\$ 57,500	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION	Employer identification number 52-2380006
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Part II Noncash Property (see Instructions)			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION	Employer identification number 52-2380006
--	--

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

Additional Data

Software ID:
Software Version:
EIN: 52-2380006
Name: DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RUTH EILENE BUTLER SULLIVAN	PRESIDENT 1 00	0	0	0
40 N E LOOP 410 SUITE 200 SAN ANTONIO, TX 78216				
JAMES W GORMAN	DIRECTOR 1 00	0	0	0
7373 BROADWAY SAN ANTONIO, TX 78209				
RUTH EILENE SULLIVAN	DIRECTOR 10 00	0	0	0
40 N E LOOP 410 SUITE 200 SAN ANTONIO, TX 78216				
DANIEL J SULLIVAN V	DIRECTOR 1 00	0	0	0
40 N E LOOP 410 SUITE 200 SAN ANTONIO, TX 78216				
VINCENT P SULLIVAN	TREASURER, SECRETARY 1 00	0	0	0
40 N E LOOP 410 SUITE 200 SAN ANTONIO, TX 78216				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALZHEIMER ASSOCIATION 7400 LOUIS PASTEUR STE 200 SAN ANTONIO, TX 78229	N/A	PUBLIC	UNRESTRICTED	50
AMERICAN CANCER SOCIETY 8115 DATAPOINT DRIVE SAN ANTONIO, TX 78229	N/A	PUBLIC	UNRESTRICTED	50
ANY BABY CAN SAN ANTONIO 217 HOWARD SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	120
BROOKS COUNTY FAIR ASSOCIATION P O BOX 835 FALFURRIAS, TX 78355	N/A	PUBLIC	UNRESTRICTED	1,000
CANCER CENTER COUNCIL 7979 WURZBACH RD SAN ANTONIO, TX 78229	N/A	PUBLIC	UNRESTRICTED	40
CASCIA HALL PREPARATORY SCHOOL 2520 SOUTH YORKTOWN AVE TULSA, OK 741142803	N/A	PUBLIC	UNRESTRICTED	100
CATHOLIC TELEVISION OF SAN ANTONIO 2718 W WOODLAWN SAN ANTONIO, TX 78228	N/A	PUBLIC	UNRESTRICTED	100
CHARITY BALL ASSOCIATION P O BOX 6708 SAN ANTONIO, TX 78209	N/A	PUBLIC	UNRESTRICTED	400
CHARITY BALL ASSOCIATION P O BOX 6708 SAN ANTONIO, TX 78209	N/A	PUBLIC	UNRESTRICTED	50
CHRIST EPISCOPAL CHURCH 510 BELKNAP PL SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	50
COIL 12414 NACOGDOCHES STE 150 SAN ANTONIO, TX 78217	N/A	PUBLIC	UNRESTRICTED	100
COMMUNITIES IN SCHOOLS 1616 E COMMERCE BLDG 1 SAN ANTONIO, TX 78205	N/A	PUBLIC	UNRESTRICTED	25
CRISTO REY NEW YORK HIGH SCHOOL 112 EAST 106TH STREET SAN ANTONIO, NY 10029	N/A	PUBLIC	UNRESTRICTED	1,000
CROSSPOINT CAPITAL CAMPAIGN 225 E LOCUST SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	25,000
CTRC AT UTHSCSA-CABINET 7703 FLOYD CURL DRIVE MC 7835 SAN ANTONIO, TX 782299674	N/A	PUBLIC	UNRESTRICTED	1,000
Total  3a				95,255

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CTRC AT UTHSCSA-CABINET 7703 FLOYD CURL DRIVE MC 7835 SAN ANTONIO, TX 782299674	N/A	PUBLIC	UNRESTRICTED	1,000
EPISCOPAL DIOCESE OF WEST TEXAS P O BOX 6885 SAN ANTONIO, TX 78209	N/A	PUBLIC	WORLD MISSION DIVISION SUDANESE SUNRISE FUND	500
ECUMENICAL CENTER FOR RELIGION & HEALTH 8310 EWING HALSELL DRIVE SAN ANTONIO, TX 78229	N/A	PUBLIC	UNRESTRICTED	100
FAMILY SERVICES ASSOCIATION 702 SAN PEDRO SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	50
FAMILY SERVICES ASSOCIATION 702 SAN PEDRO SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	50
FAMILY SERVICES ASSOCIATION 702 SAN PEDRO SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	1,000
FAMILY SERVICES ASSOCIATION 702 SAN PEDRO SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	50
FIRST PRESBYTERIAN CHURCH 404 N ALAMO STREET SAN ANTONIO, TX 78205	N/A	PUBLIC	UNRESTRICTED	50
FRIENDS OF HOSPICE SAN ANTONIO P O BOX 40487 SAN ANTONIO, TX 782294087	N/A	PUBLIC	UNRESTRICTED	100
HEALY MURPHY CENTER 618 LIVE OAK STREET SAN ANTONIO, TX 78202	N/A	PUBLIC	UNRESTRICTED	1,000
HISTORICAL CENTRE FOUNDATION P O BOX 831078 SAN ANTONIO, TX 782831078	N/A	PUBLIC	UNRESTRICTED	50
HUMANE SOCIETY OF BEXAR COUNTY 4804 FREDERICKSBURG ROAD SAN ANTONIO, TX 78229	N/A	PUBLIC	UNRESTRICTED	50
KIPP ASPIRE ACADEMY INC 735 FREDERICKSBURG RD SAN ANTONIO, TX 78201	N/A	PUBLIC	UNRESTRICTED	1,000
KLRN 501 BROADWAY SAN ANTONIO, TX 782151820	N/A	PUBLIC	UNRESTRICTED	1,000
LAS CASAS FOUNDATION P O BOX 15873 SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	250
Total  3a				95,255

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
LOS COMPADRES DE SAN ANTONIO MISSIONS HISTORICAL PARK 6701 SAN JOSE DRIVE SAN ANTONIO, TX 78214	N/A	PUBLIC	UNRESTRICTED	1,000
OPERATION COMFORT 4900 BROADWAY SAN ANTONIO, TX 78209	N/A	PUBLIC	UNRESTRICTED	5,000
RETURNING HEROES HOME INC P O BOX 202194 DALLAS, TX 753202194	N/A	PUBLIC	UNRESTRICTED	80
SALVATION ARMY OF SAN ANTONIO P O BOX 831 SAN ANTONIO, TX 782930831	N/A	PUBLIC	UNRESTRICTED	50
SALVATION ARMY OF SAN ANTONIO P O BOX 831 SAN ANTONIO, TX 782930831	N/A	PUBLIC	UNRESTRICTED	100
SAN ANTONIO BOTANICAL CENTER SOCIETY INC P O BOX 6569 SAN ANTONIO, TX 782096569	N/A	PUBLIC	UNRESTRICTED	1,000
SAN ANTONIO BOTANICAL CENTER SOCIETY INC P O BOX 6569 SAN ANTONIO, TX 782096569	N/A	PUBLIC	UNRESTRICTED	175
SAN ANTONIO BOTANICAL CENTER SOCIETY INC P O BOX 6569 SAN ANTONIO, TX 782096569	N/A	PUBLIC	UNRESTRICTED	100
SAN ANTONIO BOTANICAL CENTER SOCIETY INC P O BOX 6569 SAN ANTONIO, TX 782096569	N/A	PUBLIC	UNRESTRICTED	50
SAN ANTONIO CAN 745 E MULBERRY STE 350 SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	50
SAN ANTONIO MUSEUM OF ART 200 WEST JONES SAN ANTONIO, TX 78215	N/A	PUBLIC	UNRESTRICTED	50
SAN ANTONIO YOUTH FOR CHRIST 5730 KENWICK SAN ANTONIO, TX 78238	N/A	PUBLIC	UNRESTRICTED	500
SAN ANTONIO YOUTH FOR CHRIST 5730 KENWICK SAN ANTONIO, TX 78238	N/A	PUBLIC	UNRESTRICTED	100
SAY SI 1518 S ALAMO SAN ANTONIO, TX 782049906	N/A	PUBLIC	UNRESTRICTED	100
SOUTHERN BROOKS VOL FIRE DEPARTMENT P O BOX 57 ENCINO, TX 78353	N/A	PUBLIC	UNRESTRICTED	1,000
Total  3a				95,255

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SOUTHWEST FOUNDATION FOR BIOMEDICAL RESEARCH 7620 NW LOOP 410 SAN ANTONIO, TX 782275301	N/A	PUBLIC	UNRESTRICTED	1,000
SOUTHWEST FOUNDATION FOR BIOMEDICAL RESEARCH 7620 NW LOOP 410 SAN ANTONIO, TX 782275301	N/A	PUBLIC	GOLDEN CIRCLE	1,000
SOUTHWEST FOUNDATION FORUM P O BOX 6648 SAN ANTONIO, TX 78209	N/A	PUBLIC	UNRESTRICTED	50
SOUTHWEST FOUNDATION FORUM P O BOX 6648 SAN ANTONIO, TX 78209	N/A	PUBLIC	UNRESTRICTED	250
SOUTHWEST SCHOOL OF ART & CRAFT 300 AUGUSTA SAN ANTONIO, TX 782051216	N/A	PUBLIC	UNRESTRICTED	250
ST ANTHONY CATHOLIC HIGH SCHOOL 3200 MCCULLOUGH SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	5,000
ST LUKE'S UNITED METHODIST CHURCH 222 NW 15TH STREET OKLAHOMA CITY, OK 73103	N/A	PUBLIC	UNRESTRICTED	50
ST MARK'S ESPISCOPAL CHURCH 315 E PECAN STREET SAN ANTONIO, TX 78205	N/A	PUBLIC	UNRESTRICTED	100
ST MARK'S ESPISCOPAL CHURCH 315 E PECAN STREET SAN ANTONIO, TX 78205	N/A	PUBLIC	UNRESTRICTED	25
ST MARK'S ESPISCOPAL CHURCH 315 E PECAN STREET SAN ANTONIO, TX 78205	N/A	PUBLIC	UNRESTRICTED	25
ST MARY'S UNIVERSITY 1 CAMINO SANTA MARIA STREET SAN ANTONIO, TX 782289222	N/A	PUBLIC	UNRESTRICTED	500
ST MONICA'S GUILD 11 WALDENSHIRE SAN ANTONIO, TX 78209	N/A	PUBLIC	UNRESTRICTED	50
ST MONICA'S GUILD 11 WALDENSHIRE SAN ANTONIO, TX 78209	N/A	PUBLIC	UNRESTRICTED	50
ST PAUL'S LUTHERAN CHURCH P O BOX 58 SAN ANTONIO, TX 78861	N/A	PUBLIC	UNRESTRICTED	50
SUNSHINE COTTAGE SCHOOL FOR DEAF CHILDREN 103 TULETA SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	50
Total  3a				95,255

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SUNSHINE COTTAGE SCHOOL FOR DEAF CHILDREN 103 TULETA SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	200
SW FOUNDATION OF BIOMEDICAL RESEARCH P O BOX 760549 SAN ANTONIO, TX 782450549	N/A	PUBLIC	UNRESTRICTED	50
SW FOUNDATION OF BIOMEDICAL RESEARCH P O BOX 760549 SAN ANTONIO, TX 782450549	N/A	PUBLIC	UNRESTRICTED	950
SW FOUNDATION OF BIOMEDICAL RESEARCH P O BOX 760549 SAN ANTONIO, TX 782450549	N/A	PUBLIC	UNRESTRICTED	50
TAYA HEALTH 1400 SPRING STREET STE 200 SILVER SPRING, MD 20910	N/A	PUBLIC	UNRESTRICTED	5,000
TEXAS PUBLIC RADIO 8401 DATAPOINT DRIVE SUITE 800 SAN ANTONIO, TX 78229	N/A	PUBLIC	UNRESTRICTED	365
THE CHILDREN'S BEREAVEMENT CENTER 205 WEST OLMOS DRIVE SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	100
THE CHILDREN'S BEREAVEMENT CENTER 205 WEST OLMOS DRIVE SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	50
THE CHILDREN'S BEREAVEMENT CENTER 205 WEST OLMOS DRIVE SAN ANTONIO, TX 78212	N/A	PUBLIC	UNRESTRICTED	50
THE GOOD SHEPHERD CENTER 2718 W WOODLAWN AVE SAN ANTONIO, TX 78228	N/A	PUBLIC	UNRESTRICTED	5,000
THE GUILD 6015 BROADWAY SAN ANTONIO, TX 78209	N/A	PUBLIC	UNRESTRICTED	100
THE LEUKEMIA AND LYMPHOMA SOCIETY 431 ISOM ROAD SAN ANTONIO, TX 78216	N/A	PUBLIC	UNRESTRICTED	100
THE LEUKEMIA AND LYMPHOMA SOCIETY 431 ISOM ROAD SAN ANTONIO, TX 78216	N/A	PUBLIC	UNRESTRICTED	100
THE VILLAGE AT INCARNATE WORD 4707 BROADWAY SAN ANTONIO, TX 78209	N/A	PUBLIC	UNRESTRICTED	50
THE WESTFIELD SCHOOL BOOSTERS ASSOCIATION P O BOX 564 WESTFIELD, NJ 070910594	N/A	PUBLIC	UNRESTRICTED	100
Total  3a				95,255

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TRINITY WASHINGTON UNIVERSITY 125 MICHIGAN AVE NE WASHINGTON,DC 20017	N/A	PUBLIC	UNRESTRICTED	1,750
UNITED WAY OF SAN ANTONIO AND BEXAR COUNTY 700 S ALAMO SAN ANTONIO,TX 78205	N/A	PUBLIC	UNRESTRICTED	1,000
UNIVERSITY OF THE INCARNATE WORD 4301 BROADWAY SAN ANTONIO,TX 782096397	N/A	PUBLIC	SCHOOL OF NURSING	25,000
UTHSCSA 7703 FLOYD CURL DRIVE SAN ANTONIO,TX 782293900	N/A	PUBLIC	UNRESTRICTED	1,000
UTHSCSA 7703 FLOYD CURL DRIVE SAN ANTONIO,TX 782293900	N/A	PUBLIC	UNRESTRICTED	1,000
VILLA FINALE 122 MADISON STREET SAN ANTONIO,TX 78204	N/A	PUBLIC	UNRESTRICTED	100
Total  3a				95,255

TY 2010 Accounting Fees Schedule

Name: DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION

EIN: 52-2380006

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CARNEIRO CHUMNEY & CO L C	20,950	10,475		10,475

**TY 2010 Investments Corporate
Bonds Schedule****Name:** DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION**EIN:** 52-2380006

Name of Bond	End of Year Book Value	End of Year Fair Market Value
MERCK & COMPANY INC 25,000 DUE 6/30/2015	26,197	26,823
MICROSOFT CORPORATION 25,000 DUE 6/1/2014	25,306	26,024
STANFORD UNIVERSITY 25,000 DUE 5/1/2016	24,970	26,742
DOUBLELINE TOTAL RETURN BOND FD 1606.952	16,873	17,564
EATON VANCE GLOBAL MACRO ABSLTE 1550.867 SHS	16,098	15,943
FEDERATED INTERMED CORP BOND FD 2836.063 SHS	25,825	28,588
GOLDMAN SACHS ENHANCED INCOME 2914.374 SHS	28,182	28,007
JPMORGAN HIGH YIELD BOND FUND 3614.43 SHS	26,983	29,385
JPMORGAN STRATEGIC INCOME OPPS-SELECT 1934.648 SHS	22,558	22,887
PIMCO DEVELOPING LOCAL MKTS 1099.625 SHS	9,877	11,656

TY 2010 Investments Corporate
Stock Schedule

Name: DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION
EIN: 52-2380006

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AMERICAN FINL GROUP INC 334 SHS	6,820	10,785
AMGEN INC 205 SHS	10,767	11,254
ARCHER DANIELS MIDLAND 283 SHS	9,435	8,513
A T & T INC 199 SHS	7,583	5,847
BANK OF NEW YORK MELLON CORP 350 SHS	16,046	10,570
BARD C R INC 60 SHS	5,063	5,506
BHP BILLITON LTD 64 SHS	5,456	5,947
CANADIAN NATIONAL RAILWAY CO 251 SHS	15,021	16,684
CHEVRON CORP 95 SHS	8,292	8,669
CHICOS FAS INC 1257 SHS	11,679	15,122
CHUBB CORP 177 SHS	7,089	10,556
COINSTAR INC 166 SHS	7,992	9,369
COMCAST CORPORATION 721 SHS	10,931	15,840
COAMERICA INC 192 SHS	7,325	8,110
CULLEN FROST BANKERS INC 1000 SHS	8,942	61,120
DENBURY RESOURCES INC 618 SHS	9,039	11,798
DEVON ENERGY CORP 189 SHS	16,381	14,838
DISNEY (WALT) COMPANY HOLDING 238 SHS	5,664	8,552
E M C CORP 604 SHS	6,784	13,832
EATON CORP 223 SHS	9,860	22,637
EOG RESOURCES INC 148 SHS	9,755	13,529
EXXON MOBIL CORPORATION 147 SHS	10,319	10,749
FEDEX CORP 141 SHS	11,661	13,114
FMC CORP 193 SHS	9,057	15,419
FOREST LABORATORIES INC 427 SHS	12,611	13,655
INTL BUSINESS MACHINES CORP 62 SHS	7,489	9,099
ISHARES S&P SMALLCAP 600 INDEX FUND 1155 SHS	53,504	79,083
JOHNSON & JOHNSON 120 SHS	8,120	7,422
LOWES COS INC 531 SHS	12,560	13,317
MARATHON OIL CORP 319 SHS	9,944	11,812

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MEDCO HEALTH SOLUTIONS INC 225 SHS	9,088	13,786
NETFLIX INC 88 SHS	11,440	15,462
NOVARTIS AG 310 SHS	16,211	18,274
NTT DOCOMO INC 482 SHS	7,625	8,396
ORACLE CORPORATION 352 SHS	4,568	11,018
PAYCHEX INC 309 SHS	12,103	9,551
PERKINLMER INC 693 SHS	15,419	17,893
PROCTOR & GAMBLE CO 133 SHS	8,425	8,556
QUALCOMM INC 166 SHS	6,731	8,215
SAFEWAY INC 563 SHS	14,026	12,662
SONY CORP 501 SHS	16,375	17,891
SOUTHWEST AIRLINES CO 1560 SHS	14,429	20,249
STARBUCKS CORP 508 SHS	4,901	16,322
SYSCO CORP 444 SHS	12,412	13,054
TEXAS INSTRUMENTS INC 610 SHS	14,977	19,825
TIME WARNER CABLE INC 309 SHS	9,549	9,940
TREEHOUSE FOODS INC 320 SHS	9,477	16,349
TYSON FOODS INC 466 SHS	8,107	8,025
UNILEVER PLC SPONSORED ADR 409 SHS	11,522	12,630
UNITED CONTINENTAL HLDGS INC 937 SHS	11,792	22,319
UNITEDHEALTH GROUP INC 399 SHS	10,466	14,408
UTILITIES SELECT SECTOR SPDR FUND 257 SHS	8,140	8,054
VERIZON COMMUNICATIONS 385 SHS	13,081	13,775
WAL MART STORES INC 206 SHS	11,382	11,110
WR BERKLEY CORP 202 SHS	4,667	5,531
3M CO 193 SHS	12,002	16,656
ABB LTD 79 SHS	1,591	1,774
ABBOTT LABORATORIES 22 SHS	1,100	1,054
ADAMS EXPRESS COMPANY 476 SHS	4,423	5,112
ALLIANCE DATA SYS CORP 174 SHS	12,170	12,359

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AMERICAN TOWER CORP 16 SHS	829	826
ANADARKO PETE CORP 16 SHS	938	1,219
ANHEUSER-BUSCH INBEV 19 SHS	1,096	1,085
AUTODESK INC 24 SHS	793	917
BOEING CO 33 SHS	2,151	2,154
CHUBB CORP 13 SHS	663	775
COHEN & STEERS REIT & UTIL INCOME FD 164 SHS	2,401	2,693
COMPASS DIVERSIFIED HLDGS 1129 SHS	16,938	19,972
DR PEPPER SNAPPLE GROUP INC 38 SHS	1,386	1,336
EMC CORP 103 SHS	1,952	2,359
ENSCO PLC 9 SHS	404	480
EXELON CORP 27 SHS	1,129	1,124
EXXON MOBIL CORPORATION 44 SHS	2,999	3,217
FORD MTR CO 86 SHS	1,146	1,444
GENERAL AMERICAN INV TR CO 141 SHS	2,538	3,782
GENERAL ELECTRIC COMPANY 121 SHS	1,860	2,213
GOOGLE INC 6 SHS	3,160	3,564
GUGGENHEIM OCEAN TOMO PATIENT ETF 711 SHS	15,969	18,095
GUGGENHEIM RAYMOND JAMES SB-1 EQUITY 1164 SHS	20,800	24,479
GUGGENHEIM TF INSIDER SENTIMENT ETF 599 SHS	14,909	19,557
H & Q LIFE SCIENCES INVS SH BEN INT 306 SHS	2,531	3,296
HALLIBURTON CO HOLDING CO 59 SHS	1,809	2,409
INGERSOLL-RAND PLC 24 SHS	1,002	1,130
INTL PAPER CO 48 SHS	1,266	1,308
INVESCO LTD 27 SHS	570	650
ISHARES BARCLAYS TREAS INFLATION PROTECTED SECS FD 133 SHS	13,840	14,300
ISHARES GOLD TRUST ISHARES 1801 SHS	21,212	25,034
ISHARES INC MSCI CANADA INDEX FD 608 SHS	16,991	18,848
ISHARES TR S & P 500 INDX FD 30 SHS	3,242	3,788
JOHNSON & JOHNSON 19 SHS	1,236	1,175

Name of Stock	End of Year Book Value	End of Year Fair Market Value
JOHNSON CTLS INC 54 SHS	1,519	2,063
JPMORGAN CHASE & CO 63 SHS	2,506	2,672
JPMORGAN CHASE & CO ALERIAN MLP INDEX 526 SHS	16,029	19,120
KRAFT FOODS INC 50 SHS	1,493	1,576
LIBERTY ALL STAR EQUITY FD SH BEN INT 1403 SHS	4,767	6,917
LIBERTY ALL STAR GROWTH FD 639 SHS	2,360	2,716
LOWES COMPANIES 112 SHS	2,784	2,809
MACYS INC 51 SHS	1,157	1,290
MEDTRONIC INC 29 SHS	1,046	1,076
MERCK & CO INC 47 SHS	1,798	1,694
METLIFE INC 45 SHS	1,762	2,000
MICROSOFT CORP 92 SHS	2,682	2,568
MONSANTO CO NEW 18 SHS	979	1,254
MORGAN STANLEY 56 SHS	1,609	1,524
NESTLE SA SPON ADR 19 SHS	973	1,116
NUCOR CORP 36 SHS	1,605	1,578
ORACLE CORPORATION 82 SHS	2,021	2,567
PACCAR INC 16 SHS	817	917
PAYCHEX INC 31 SHS	1,006	958
PZIZER INC 136 SHS	2,351	2,381
QUALCOMM INC 61 SHS	2,343	3,019
RAYTHEON CO 21 SHS	1,196	973
ROYCE VALUE TR INC 400 SHS	4,657	5,816
RYDEX ETF TR S&P 500 EQ TRD 135 SHS	4,642	6,387
SCHLUMBERGER LIMITED 40 SHS	2,521	3,340
SCHWAB CHARLES CORP 121 SHS	2,091	2,070
SOUTHWEST AIRLINES CO 83 SHS	1,081	1,077
SPDR DOW JONES INDL AVERAGE ETF 72 SHS	7,589	8,325
SPDR S & P 500 ETF TRUST 78 SHS	7,547	9,809
SPDR SER TR S & P DIVID ETF 443 SHS	21,827	23,027

Name of Stock	End of Year Book Value	End of Year Fair Market Value
STAPLES INC 79 SHS	1,768	1,799
SUNAMERICA FOCUSED ALPHA GRW FD 371 SHS	4,876	6,507
SUNAMERICA FOCUSED ALPHA LC FD 189 SHS	2,130	2,975
TARGET CORP 35 SHS	1,865	2,105
TOLL BROS INC 33 SHS	657	627
TRAVELERS COS INC 18 SHS	939	1,003
TRI CONTINENTAL CORP 203 SHS	2,464	2,793
UNITED PARCEL SVC INC 35 SHS	2,168	2,540
VANGUARD BD INDES FD INC 2051 SHS	162,513	164,634
VANGUARD INDEX FDS VANGUARD MIDCAP VIPERS 73 SHS	3,305	5,436
VANGUARD INDEX FDS VANGUARD LARGE CAP VIPERS 107 SHS	4,678	6,164
VANGUARD INDEX FDS VANGUARD SMALL CAP VIPERS 56 SHS	2,448	4,067
VANGUARD INDEX FDS VANGUARD TOTAL STK MKT ETF 2168 SHS	131,100	140,768
WASTE MANAGEMENT INC 16 SHS	544	590
WESTERN UNION CO 48 SHS	807	891
ABSOLUTE OPPORTUNITY FUNDS INSTL 3279.107 SHS	39,079	40,759
ABSOLUTE STRATEGIES INSTITUTIONAL 1064.091 SHS	10,569	11,535
ASG MANAGED FUTURES STRATEGY FUND 1045.406 SHS	11,719	11,081
ASTON/TAMRO SMALL CAP 621.791 SHS	10,387	13,157
DWS DISCIPLINED MKT NEUTRAL FUND 2272.461 SHS	21,702	21,271
DWS RREF GLOBAL REAL ESTATE SEC 1554.027 SHS	8,292	11,640
JOHN HANCOCK TECHNICAL OPPS 2012.957 SHS	21,359	22,887
LEUTHOLD ASSET ALLOCATION 2235.733 SHS	18,700	23,453
LISTED PRIVATE EQUITY INSTL 6628.339 SHS	31,344	36,323
MERGER FUND 1391.688 SHS	21,001	21,961
NUVEEN TRADEWINDS INSTL VALUE 1409.275 SHS	31,262	36,726
RIVERNORTH CORE OPPORTUNITY FUND 2459.031 SHS	23,292	29,951
T ROWE PRICE EMERGING MKTS STOCK 676.6 SHS	14,797	23,870
WASATCH EMERGING MARKETS SMALL CAP FD 10239.247 SHS	19,045	26,315
WILLIAM BLAIR INTERNAT'L GROWTH 1733.279 SHS	25,781	38,721

TY 2010 Investments Government Obligations Schedule

Name: DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION

EIN: 52-2380006

**US Government Securities - End of
Year Book Value:**

0

**US Government Securities - End of
Year Fair Market Value:**

0

**State & Local Government
Securities - End of Year Book
Value:**

344,385

**State & Local Government
Securities - End of Year Fair
Market Value:**

358,823

TY 2010 Investments - Other Schedule

Name: DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION

EIN: 52-2380006

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
SAN JUAN BASIN ROYALTY TRUST 629 UNITS	AT COST	17,383	14,802

TY 2010 Other Income Schedule

Name: DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION

EIN: 52-2380006

Description	Revenue And Expenses Per Books	Net Invest ment Income	Adjusted Net Income
SAN JUAN BASIN ROYALTY TRUST	1,186	1,186	1,186
COMPASS DIVERSIFIED HOLDINGS-NET	203	203	203

TY 2010 Other Professional Fees Schedule**Name:** DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION**EIN:** 52-2380006

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FROST NATIONAL BANK	1,360	1,360		0
SOUTH TEXAS MONEY MANAGEMENT	9,050	9,050		0
BRINKER CAPITAL	13,469	13,469		0

TY 2010 Taxes Schedule**Name:** DANIEL J SULLIVAN FAMILY CHARITABLE FOUNDATION**EIN:** 52-2380006

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	2,740	0		0
FOREIGN TAXES	352	352		0
PRODUCTION TAXES	133	133		0