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# Form **990-PF**

# **Return of Private Foundation**

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

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.

OMB No 1545-0052

2010

For c	calendar year 2010, or tax ye	ar beginning	<u>.                                    </u>	, and ending		
G C	heck all that apply:	Initial return	Initial return of a fo	·	Final return	1
Nan	ne of foundation	Amended return	Address chang	ge	Name change  A Employer identification	numher
IVQII	ne or roundation				- Employer recitation	
	AVERY FAM	ILY TRUST			73-6314003	<u> </u>
Nun	nber and street (or PO box number		address)	Room/suite	B Telephone number	
		6TH STREET		<u> </u>	918-742-71	.91
City	or town, state, and ZIP code	~ 4 4 4 4			C if exemption application is p	
	TULSA, OK				D 1. Foreign organizations	
<u> </u>	Check type of organization:	X Section 501(c)(3) ex	• •	A	Foreign organizations me check here and attach co	omputation
<u> </u>	Section 4947(a)(1) nonexelur market value of all assets at		Other taxable private foundand method: X Cash	Accrual	E if private foundation sta	
		·   —	ther (specify)	Acciuai	under section 507(b)(1)	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
	om Part II, col. (c), line 16) -\$	8 416 (Part I. colu	mn (d) must be on cash t	pasis.)	F If the foundation is in a under section 507(b)(1)	
	art   Analysis of Revenue a	nd Expenses	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
	(The total of amounts in col necessarily equal the amou	umns (b), (c), and (d) may not ints in column (a) )	expenses per books	income	income	for charitable purposes (cash basis only)
	1 Contributions, gifts, grain	nts, etc., received	875,140.		N/A	
	2 Check In the foundate	ion is not required to attach Sch. B				
	3 Interest on savings and temporal cash investments	porary				
	4 Dividends and interest fi	rom securities	189,649.	182,309.		STATEMENT 1
	5a Gross rents					
	Net rental income or (loss)					
<u>•</u>	6a Net gain or (loss) from sale of Gross sales price for all		<93,581.	>	<u></u>	
en	assets on line 6a	212,107.			DE	CEIVED
Revenue	7 Capital gain net income (from			0.	1 1	JOLIVED 10
	8 Net short-term capital g	ain			l   m	+
	9 Income modifications Gross sales less returns	1			SEP SEP	<u> 1 2 2011   유</u>
	10a and allowances					<u> </u>
	b Less Cost of goods sold c Gross profit or (loss)				99	DEN. UT
	11 Other income		,			
	12 Total. Add lines 1 throu	iah 11	971,208.	182,309.		
	13 Compensation of officers, d		0.	0.		0.
	14 Other employee salaries	and wages				_
	15 Pension plans, employe	e benefits				
Expenses	16a Legal fees	STMT 2	23,707.	23,707.		0.
, ea	<b>b</b> Accounting fees	STMT 3	240.	240.		0.
Ä						
tive	17 Interest					
tra	18 Taxes	STMT 4	2,307.	2,307.		0.
inis	19 Depreciation and deplet	ion				<del> </del>
Administrative	20 Occupancy	dations	-		<del> </del>	<del> </del>
ΑÞ	21 Travel, conferences, and	=			<del> </del>	
jan	22 Printing and publication 23 Other expenses	STMT 5	84,991.	84,991.		0.
Operating and	24 Total operating and ad		04,331.	04,331.	<u> </u>	1
era	expenses. Add lines 13		111,245.	111,245.		0.
Ö	25 Contributions, gifts, gra		464,350.		<u></u>	464,350
	26 Total expenses and dis	•				
	Add lines 24 and 25		575,595.	111,245.		464,350
	27 Subtract line 26 from lii	ne 12:				
	& Excess of revenue over exp	enses and disbursements	395,613.	<u></u>	1	
	b Net investment income	(if negative, enter -0-)		71,064.		
	c Adjusted net income (if	negative, enter -0-)			N/A	

Page 2

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
P	an	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	1,064,042.	757,370.	757,370.
		Savings and temporary cash investments			
		Accounts receivable ►			<del></del>
	1	Less; allowance for doubtful accounts			
	l	Pledges receivable			
	1	Less: allowance for doubtful accounts			
		Grants receivable			· · · · · · · · · · · · · · · · · · ·
	1		<del> </del>		<del></del>
	0	Receivables due from officers, directors, trustees, and other			
	l _	disqualified persons			
	7	Other notes and loans receivable			
		Less: allowance for doubtful accounts			
ets	1 -	Inventories for sale or use			
Assets		Prepaid expenses and deferred charges			<del></del>
•	1	Investments - U.S. and state government obligations			
	1	Investments - corporate stock STMT 6	6,112,416.	5,806,665.	6,925,535.
	C	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation	758,710.	1,465,000.	1,465,000.
	12	Investments - mortgage loans			
	13	Investments - other			· · · · · · · · · · · · · · · · · · ·
	14	Land, buildings, and equipment: basis			
		Less accumulated depreciation			
	15	Other assets (describe ► STATEMENT 7)	155,397.	488,997.	530,511.
					•
	16	Total assets (to be completed by all filers)	8,090,565.	8,518,032.	9,678,416.
		Accounts payable and accrued expenses			
	18	Grants payable			
ç	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
폁	21	Mortgages and other notes payable			
Ë	1	Other liabilities (describe  )			
		The factor of th	·		
	23	Total liabilities (add lines 17 through 22)	0.	0.	
_	120	Foundations that follow SFAS 117, check here		•	
	]	and complete lines 24 through 26 and lines 30 and 31.			
S	24	Unrestricted		1	
Š	1	The state of the s			
ag	25	Temporarily restricted	<del></del>		
B	26	Permanently restricted			
Net Assets or Fund Balances		Foundations that do not follow SFAS 117, check here			
5		and complete lines 27 through 31.		^	
ş	27	Capital stock, trust principal, or current funds	0.	0.	
SS	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
¥	29	Retained earnings, accumulated income, endowment, or other funds	8,090,565.	8,518,032.	
ž	30	Total net assets or fund balances	8,090,565.	8,518,032.	
			0 000 565	2 542 222	
_	31	Total liabilities and net assets/fund balances	8,090,565.	8,518,032.	
F	art	III Analysis of Changes in Net Assets or Fund B	alances		
_					· · · · · · · · · · · · · · · · · · ·
1		I net assets or fund balances at beginning of year - Part II, column (a), line	30		
	•	st agree with end-of-year figure reported on prior year's return)		1	8,090,565.
2		r amount from Part I, line 27a		2	395,613.
3	Othe	r increases not included in line 2 (itemize)  MISCELLANEO	US	3	31,854.
4	Add	lines 1, 2, and 3		4	8,518,032.
5	Decr	eases not included in line 2 (itemize)		5	0.
6	Tota	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b), line 30	6	8,518,032.
					Form <b>990-PF</b> (2010)

023521 12-07-10

Form 990-PF (2010)

Exempt operating injunctations described in asscord add(q)(q), clock here		1990-PF (2010) AVERY FAMILY TRUST		14003		Page 4	
Date of ruling or determination letter:			948 - Se	e instru	ICTIO	ns)	
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ □ and enter 1% of Part I, line 12/b.  All other domestic foundations enter 2% of line 27b. Exempl foreign organizations enter 4% of Part I, line 12, cot. (b).  2 Tax under section 311 (domestic section 4947(s)(1) trusts and taxable foundations only. Others enter -0-)  3 3 1, 421.  3 3 1, 421.  5 Subtlate A (income) tax (domestic section 4947(s)(1) trusts and taxable foundations only. Others enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. It zero or less, enter -0-  5 Credis/Payments.  2 2010 estimated tax payments and 2009 overpayment credided to 2010  5 Exempl foreign organizations: Lax withheld at source  6 Tax pad with application for extension of time to life (Form 8868)  6 Backup withholding erroneously withheld  7 Total credits and payments. Add lines 5a through 6d  8 Backup withholding erroneously withheld  9 Tax due. If the total of lines 5 and 6 is more than line 7, enter amount owed  9 Tax due. If the total of lines 5 and 6 is more than line 7, enter amount owed  10 Overpayment. Ill time 7 is more than line 10 stall less 5ad 8, enter the amount of line 10 to the 5c edited to 2011 estimated tax ▶ 1,327. Returded ▶ 10 1,327.  11 Enter the amount of line 10 to the 5c edited to 2011 estimated tax ▶ 1,327. Returded ▶ 11 0 1,327.  12 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 campayin?  10 Uning the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campayin?  10 Uning the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campayin?  10 Uning the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participated or intervene in any political campayin?	1a	· · · · ·					
of Part I, line 27b 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 And lines 1 and 2 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or less, enter -0-) 6 Textify and the subtraction of the certains or line to file (Form 8868) 6 Exempt foreign organizations - tax withheld at source 6 Departments 7 Tax der, lift line 7 is more than 16 from 8868) 6 Each group with application for exclusions of time to file (Form 8868) 6 Backup withhelding erroneously withheld 8 Einter amy penalty for underpayment of estimated tax. Check here I of form 2220 is attached 9 Tax der, lift lotal or lines 5 and 8 is more than line 7, enter amount owed 9 Toverpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 10 overpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 10 overpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 11 Tax or line 17 line 7 is more than the total or lines 5 and 8.  12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any pothical campaign? 10 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any pothical campaign or 1 line 7 is or 1 line 1							
c. All other domestic foundations enter 2% of the 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).    2	b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here   and enter 1%	1		1,4	<u>21.</u>	
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 1, 421.  3 Add lines 1 and 2 4 Subtitle 4 (morme) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or fess, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or fess, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or fess, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or fess, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zero or fess, enter -0-) 6 Bearty from or companies and 2009 overpayment credited to 2010 6 Bearty from or displayments. Add lines 5a through 6d 6 Backup withholding erroneously withheld at source 6 Tax pad with application for extension of time to file (form 8969) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 5a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here line 7 from 2220 is attached 8 Enter any penalty for underpayment of estimated tax. Check here line 7 from 2220 is attached 9 Tax due, If the folial of lines 15 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total or lines 5 and 8, enter the amount overpaid 11 Lineter the amount of line 10 libe. Fored died 2011 learning that line 1 (zero died 2011) 12 Juring the tax year, did the foundation attempt to influence any national, state, or local legistation or did participate or intervene in any political campaign? 10 During the tax year, did the foundation attempt to influence any national, state, or local legistation or definition? 11 He arsives is "Yes" to 1 or 1b, situation a detailed description of the activities. 10 During the harmonic file from 11520 PLO for this year? 11 He arsives is "Yes" to 1 for or 1b, si							
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a 2010 estimated tax payments and 2009 overpayment credited to 2010 b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld Total credits and payments. Add lines Sa through 6d Enter any penalty for underpayment of estimated tax. Check here  form 2220 is attached Enter any penalty for underpayment of estimated tax. Check here  form 2220 is attached Total credits, lines S and 8 is more than line 7, enter amount owed To experiment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To experiment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To experiment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To experiment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To experiment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To experiment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To experiment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To experiment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid To experiments. If line 7 is more than 100 be. Credited to 2011 estimated tax ▶  D. Cather the amount of line 100 be. Credited to 2011 estimated tax. ▶  To but the foundation mere 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 6 committee the 200 but the foundation of the activities.  But the answer is "Yes" to 1a or 1b, attach a detailed description of the activities.  But the tour distribution of the year of the changes of t	5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5		1,4	<u>21.</u>	
b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penality for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax dise. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax dise. If the total of lines 5 and 8 is more than line 17, enter amount owed 9 Tax dise. If the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a 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? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political egislation or did it participate or intervene in any political campaign? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political equiposes (see instructions for definition)? 1c Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 1c Did the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0. (3) On the similar instruments? If "'es," attach a conformed copy of the changes 11 Has the foundation made any changes, not previously reported to the IRS? 11 Has the foundation made any changes, not previously reported to the IRS? 11 Has the foundation made any changes, not previously report		· · · · · · · · · · · · · · · · · · ·					
c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withhold 1 Total credits and payments. Add lines 6a through 6d 2 Tax due. If the total of lines 5 and 8 is more than the rotal of lines 5 and 8, enter than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be; Credited to 2011 estimated tax ► 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a 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? 1b Did it speen from the than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b L X 1f the answer is "Yes" to 1a or 1b, attach a detailed description of the activities. 1c Did the foundation life Form 1120-PCL for this year? 2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. 2 In "Yes," attach a detailed description of the activities. 3 Has the foundation engaged in any activities that have not previously been reported to the IRS? 1 "Yes," attach a detailed description of the activities. 3 Has the foundation engaged in any activities that have not previously been reported to the IRS? 1 "Yes," attach a detailed description of the activities. 4 But 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 4 Did If "Yes," attach a detailed description of this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 1 If "Yes," attach the sta							
d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6 athrough 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be Credited to 2011 estimated tax ▶ 1, 327. Refunded 11 0 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? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b X   Yes No any political campaign? 1c Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1c Enter the amount of any of 1 at x a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. 2 bid the foundation. In a connection with the activities. 3 bid the foundation. It is a political expenditures (section 4955) imposed during the year: 3 c) C Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. It is a state to the foundation. It is a conformation of the activities. 4 bid the foundation made any changes, not previously reported to the IRS? 4 bid the foundation have unrelated business gross income of \$1,000 or more during the year? 5 Vas there a liquidation, termination, dissolution, or substantial contraction during the year? 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 6 by shapinguage in the governing instrument; 7 c) By state legislation that effectively amends the governing instrument so that no mandatory direc							
7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Toverpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owerpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11	C						
8 Enter any penalty for underpayment of estimated tax. Check here	d	Backup withholding erroneously withheld					
1 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 1 0 0.  Part VII-A   Statements Regarding Activities 12 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? 15 Did it spend more than \$100 during the year (either directly) for political purposes (see instructions for definition)? 15 If the answer is 7 Yes* 10 to 1 to 11b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation m connection with the activities. 16 Did the foundation file Form 1120-POL for this year? 17 On the foundation E S O. (2) On foundation managers. ► \$ O. 18 Enter the rembursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ O. 19 Has the foundation engaged in any activities that have not previously been reported to the IRS? 16 Yes, as it filed a tax return on Form 990-T for this year? 20 If Yes, as it filed a tax return on Form 990-T for this year? 30 If Yes, as it filed a tax return on Form 990-T for this year? 41 Wes, the allouidation, termination, dissolution, or substantial contraction during the year? 42 If Yes, as attach the statement required by General Instruction 7. 43 A but the foundation have unrelated business gross income of \$1,000 or more during the year? 44 If Yes, as a titled a tax return on Form 990-T for this year? 45 A but the foundation have unrelated business gross income of \$1,000 or more during the year? 46 A but the foundation that effectively amends the governing instrument, or • By state legislation that effectively amends the governing instrument. or • By state legislation that effectively amends the governing instrument. or • By state legislation that effectively amends the governing instrument. or • By state legislation that effectively amends t	7		7		<u>2,7</u>	<u>48.</u>	
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8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶	•			<del></del>	<u></u>		
OK 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  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	8:	·					
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  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	~			_			
of each state as required by General Instruction G? If "No," attach explanation  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	ı			_			
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				86	х		
year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		endar	1			
	_			9	1	X	
	10						

Form **990-PF** (2010)

X

3h

4a

N/A

Form 4720, to determine if the foundation had excess business holdings in 2010)

had not been removed from jeopardy before the first day of the tax year beginning in 2010?

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

orm 990-PF (2010) AVERY FAMILY TRUST			<u>73-6314(</u>	<u>)03</u>	<u>F</u>	Page <b>6</b>
Part VII-B   Statements Regarding Activities for Which F	orm 4720 May Be F	Required (contin	ued)			
5a During the year did the foundation pay or incur any amount to:	- <del></del>					
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	Ye	s X No			
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire	ectly,				
any voter registration drive?		Y6	es X No			
(3) Provide a grant to an individual for travel, study, or other similar purposes'	?	Ye	s X No	,		
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section			1		
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	s X No		ŀ	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f				ĺ	
the prevention of cruelty to children or animals?	,		s X No			
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	ler the exceptions described i					
section 53.4945 or in a current notice regarding disaster assistance (see instru		<del>-</del> -	N/A	5b	ĺ	
Organizations relying on a current notice regarding disaster assistance check h	•		▶□ □			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr		ined				
expenditure responsibility for the grant?		I/A 🔲 Ye	es 🔲 No			
If "Yes," attach the statement required by Regulations section 53.4945						
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	, -					
a personal benefit contract?	•	Ye	s X No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?			6Ь		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 s	helter transaction?	Ye	s X No			
b If "Yes," did the foundation receive any proceeds or have any net income attribu			N/A	7b		
Information About Officers, Directors, Trusto		nagers, Highly				
List all officers, directors, trustees, foundation managers and their		1	Len			
(a) Nama and address	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	ac	e) Expe	ense other
(a) Name and address	to position	(If not paid, enter -0-)	and deferred compensation	1 6	allowan	ices
-	TRUSTEE					
L259 E 26TH STREET						
PULSA, OK 74114	0.00	0.	0.			0.
				1		
				<del> </del>		
				1		
				<del> </del>		
· · · · · · · · · · · · · · · · · · ·						
				1		
				$oldsymbol{ol}}}}}}}}}}}}}}}}}$		
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) Contributions to	<del></del>	- \ [	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred	ac	e) Expe count, allowan	ense , other
	devoted to position	(5)	compensation	- 3	allowan	ıces
NONE				1		
	· <del></del>			<del> </del>		
				1		
			_	↓		
				1		
		ļ		<del> </del>		
		1				
	<u> </u>	<u> </u>	L	L		
Total number of other employees paid over \$50,000						0

Part VIII Paid Employees, and Contractors (continued)	anagers, riigniy	
3 Five highest-paid independent contractors for professional services. If none, enter "NONE	n	
(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 inform	nation such as the	Expenses
number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.		
1 N/A		
2	···	
3		
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 an	12.	Amount
1 <u>N/A</u>		
		0.
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3	<u> </u>	0.

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations	s, see instructions.)
$\overline{1}$	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a_	6,783,197.
Ь	Average of monthly cash balances	1b	1,038,410.
C	Fair market value of all other assets	1c	800,288.
d	Total (add lines 1a, b, and c)	1d	8,621,895.
е	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	8,621,895.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	129,328.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,492,567.
6	Minimum investment return. Enter 5% of line 5	6	424,628.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here  and do not complete this part.)	id certain	1
1	Minimum investment return from Part X, line 6	1	424,628.
2a	Tax on investment income for 2010 from Part VI, line 5		
Ь	Income tax for 2010. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	1,421.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3_	423,207.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	423,207.
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	423,207.
P	art XII Qualifying Distributions (see instructions)	· · · · ·	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		464 250
	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	464,350.
Ър		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	Year Art and A	3a	
	Cash distribution test (attach the required schedule)  Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	3b 4	464,350.
4 5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		404,000.
J	income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	464,350.
U	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation		
	4940(e) reduction of tax in those years.	42411103	

Form **990-PF** (2010)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	( <b>d</b> ) 2010
1 Distributable amount for 2010 from Part XI,	· · · · · · · · · · · · · · · · · · ·			423,207.
line 7  2 Undistributed income, if any, as of the end of 2010				423,201.
a Enter amount for 2009 only			332,651.	
b Total for prior years:				
2008, 2007, 2006		251,915.		
3 Excess distributions carryover, if any, to 2010:		231/3131		
a From 2005				
<b>b</b> From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from				<del></del>
Part XII, line 4: ►\$ 464,350.				
a Applied to 2009, but not more than line 2a			332,651.	
<b>b</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				131,699.
e Remaining amount distributed out of corpus	0.			• • •
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount	0.			0.
must be shown in column (a) )  6 Enter the net total of each column as				
indicated below:	0.			
2 Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract		251 015		
line 4b from line 2b		251,915.		· · · · · · · · · · · · · · · · · · ·
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		251,915.		
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				291,508.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011.	_			
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010	<del> </del>	<u> </u>		<u> </u>

Part XIV Private Operating For	Oundations (see ins	etructions and Part VIII	A guestion (I)		314003 Page II
			A, question 3)	N/A	
1 a If the foundation has received a ruling of		• • •			
foundation, and the ruling is effective for	-	-		40.40(.)(0) [] 4	0.404.455
b Check box to indicate whether the found		ig foundation described if	<del></del>	4942(j)(3) or4	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year (a) 2010	(b) 2009	Prior 3 years (c) 2008	(d) 2007	(e) Total
income from Part I or the minimum	(a) 2010	(0) 2009	(6) 2000	(u) 2007	(e) Total
investment return from Part X for		İ			
each year listed	-		-		
<b>b</b> 85% of line 2a					<u> </u>
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					ļ <u>-</u> .
e Qualifying distributions made directly					
for active conduct of exempt activities.					
Subtract line 2d from line 2c					<del></del>
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				1	
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	1			İ	
section 4942(j)(3)(B)(iii)					•
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income			-		
Part XV Supplementary Info			if the foundation	had \$5,000 or m	ore in assets
at any time during t	he year-see the i	nstructions.)			
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh			ributions received by the	foundation before the clo	ise of any tax
year (but only if they have contributed n	nore than \$5,000). (See s	ection 507(d)(2).)			
ETTA MAY AVERY					
b List any managers of the foundation wh			or an equally large port	on of the ownership of a p	artnership or
other entity) of which the foundation has	s a 10% or greater interes	SL.			
NONE				<del></del>	<del></del>
2 Information Regarding Contributi					
Check here  if the foundation of					
the foundation makes gifts, grants, etc.	<del>`                                    </del>			ompiete items za, d, c, an	0 Q.
a The name, address, and telephone num	ber of the person to whor	m applications should be	addressed:		
CDD CMAMDADAM O					
SEE STATEMENT 8	a submitted and informat	tion and materials they sh	aculd maludat	-	
<b>b</b> The form in which applications should b	e suumillea and intormat	uon and materials they sh	ioula iliciDae;		
c Any submission deadlines:			<del>.</del>		<del> </del>
d Any restrictions or limitations on awards	s, such as by geographica	al areas, charitable fields,	kinds of institutions, or	other factors:	

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	Purpose of grant or contribution	Amount				
Name and address (home or business)	or substantial contributor	recipient						
a Paid during the year								
				•				
SEE STATEMENT 9								
Total	T		<b>▶</b> 3a	464,350.				
<b>b</b> Approved for future payment								
NONE								
NONE								
		<u> </u>						
Total			<u>▶ 3b</u>	0.				

Part XVI-A	Analysis	of Income	-Producing	Activities
		• • • • • • • • • • • • • • • • • • • •		

	Unrelate	d business income	Exclu	ded by section 512, 513, or 514	(4)
Enter gross amounts unless otherwise indicated.	(a) (b) Business Amount		(C) Exclu- sion Amount		(e) Related or exempt function income
1 Program service revenue:	code		code	Tunodit	
a					· · · · · · · · · · · · · · · · · · ·
b					
c					·
d	<del>                                     </del>	<del></del>			
e	<del> </del>				
g Fees and contracts from government agencies	<del></del>				
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments					
4 Dividends and interest from securities			14	189,649.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
<b>b</b> Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other					====
than inventory			18	<93,581.	>
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:	1				
a REBATE			01		
b					
C					
d					
e				05.050	
12 Subtotal. Add columns (b), (d), and (e)		0.		96,068.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	96,068.
(See worksheet in line 13 instructions to verify calculations.)	<del></del> -				·····
Part XVI-B Relationship of Activities t	to the Acco	omplishment of Ex	emp	t Purposes	
Line No. Explain below how each activity for which inco	me is reported i	n column (e) of Part XVI-A	contrit	outed importantly to the accord	nplishment of
the foundation's exempt purposes (other than				•	
					·
				,	
					<del></del>
				<del> </del>	
				· · · · · · · · · · · · · · · · ·	
		<del></del>			
		<u> </u>			
					<del></del>
I					

(4) Reimbursement arrangements

(5) Loans or loan guarantees

(6) Performance of services or membership or fundraising solicitations

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

1b(4)

1b(5)

1b(6)

#### Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of: (1) Cash 1a(1) (2) Other assets 1a(2) **b** Other transactions: (1) Sales of assets to a noncharitable exempt organization 1b(1) (2) Purchases of assets from a noncharitable exempt organization 1b(2) (3) Rental of facilities, equipment, or other assets 1b(3)

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.

( <b>a)</b> Line no	(b) Amount involved	(c) Name o	f noncharitable	exempt organization	(d) Descript	tion of transfers, transac	tions, and sharing arr	angements
			N/A					
								<u>.</u>
								<del> </del>
	<u> </u>							
	<u> </u>						<del></del>	
				<del>-</del>	<del>                                     </del>			
			<del> </del>					
-								
	· · · -			-				
ın se	e foundation directly or indirec ction 501(c) of the Code (othe es," complete the following sch	r than section 501(c		, ,	anizations described	<u> </u>	Yes	X No
	(a) Name of org	janization		(b) Type of organization	n	(c) Description of	relationship	
	N/A							
	<del></del>							
	Under penalties of perjury, I declar	n that I have examined	this return include	na accompanyina cahadular	and statements, and to	the best of my knowless	to and balled it in the	
Sign	and complete Declaration of prepa						ige and belief, it is du	e, correct,
Here	See Mary Co	علام الم	istee	بندلاء ا	8 2011 N			
	Signature of officer or tri	ustee	uu	Date	8 2011	Title		
	Print/Type preparer's na		Preparer's si	gnature	Date	Check If	PTIN	<del></del>
			mil	Shahudr	9	self- employed		
Paid	MICKEY SHA	CKELFORD	MICKEY	SHACKELFOR	R 08/31/13	1		
Prepar	rer   Firm's name ▶ EID					Firm's EIN		
Use O								
	Firm's address ► 24			UITE 200				
	TU	LSA, OK	74114			Phone no.	918-748-	
							Form <b>990</b>	-PF (2010)

### Schedule B (Form 990, 990-EZ,

or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

### **Schedule of Contributors**

► Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

**Employer identification number** 

2010

73-6314003 AVERY FAMILY TRUST Organization type(check one): Filers of: Section: Form 990 or 990-F7 501(c)( ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF X 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, Ine 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

A١	VER	Y	F	AM.	IJ	L	Y	Т	RI	JS	T	

73-6314003

Part I	Contributors (see instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ETTA MAY AVERY  1259 E. 26TH STREET  TULSA, OK 74114	\$ 25,000.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
2	JACQUELINE ZINK ESTATE C/O ETTA MAY AVERY  1259 E. 26TH STREET  TULSA, OK 74114	\$750,140.	Person Payroll Noncash X (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZiP + 4	(c) Aggregate contributions	(d) Type of contribution
3	MILLICENT OGILVIE ESTATE  1259 E. 26TH STREET  TULSA, OK 74114	\$ <u>100,000</u> .	Person X Payroll  Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
0		\$	Person X Payroll Noncash (Complete Part II if there is a noncash contribution )
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)

Name of organization

Page 1 of 1 of Part II
Employer identification number

### AVERY FAMILY TRUST

73-6314003

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
2	120 ACRES SECS 31 &32, T22N, R11E, OSAGE COUNTY OK		
			01/01/10
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
aiti		_	· · · · · · · · · · · · · · · · · · ·
		\$	
(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
1453 12-23-	-10	Schedule B (Form 9	90, 990-EZ, or 990-PF) (2

Schedule B (Form 990, 990-EZ, or 990-PF) (2010) of Part III Employer identification number Name of organization AVERY FAMILY TRUST 73-6314003 Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating Part III 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, chantable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from Part I (b) Purpose of gift (c) Use of gift (d) Description of how gift is held (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

(e) Transfer of gift

(c) Use of gift

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

(d) Description of how gift is held

(a) No.

Part I

(b) Purpose of gift

Form 8	868 (Rev. 1-2011)					Page 2
	are filing for an Additional (Not Automatic) 3-Month Ex	tension.	complete only Part II and check this bo	x		X
	Only complete Part II if you have already been granted an		-		3868	
	are filing for an Automatic 3-Month Extension, comple		•			
Part				pies n	eeded).	
Туре о	Name of exempt organization			Empl	oyer identification	number
print	AVERY FAMILY TRUST			7	3-6314003	
File by th	Number street and room or suite as If a B O box s	oo inetriic	tions		2-0214002	
extended due date	1	i isti uc	uons.			
filing you return Se		oreign add	lress, see instructions.			
instructio		J				
Enter t	ne Return code for the return that this application is for (file	e a separa	te application for each return)			0 4
	<del></del>	Ι	Ι			<del></del>
Applic	ation	Return	Application			Return
<u>Is For</u>		Code	ls For			Code
Form 9		01	Farm 1041 A			
Form 9		02	Form 1041-A Form 4720			08
Form 9		03	Form 5227			10
	90-FF (sec. 401(a) or 408(a) trust)	05	Form 6069	•	· · · · · · · · · · · · · · · · · · ·	11
Form 990-T (trust other than above) 06 Form 8870						12
	Do not complete Part II if you were not already granted	,		slv file	d Form 8868	12
<u> </u>	BANK OF OKLAHO		nado o montir extensión on a provios	<u> </u>	<u>u i omi occe.</u>	
• The	books are in the care of P.O. BOX 2300		SA. OK 74192			
	phone No ► (918)293-7566		FAX No. ▶			
	e organization does not have an office or place of busines	s in the Ur	nited States, check this box			
	is is for a Group Return, enter the organization's four digit			s is foi	the whole group, o	heck this
box 🕨	If it is for part of the group, check this box	and atta	ach a list with the names and EINs of all	memb	ers the extension is	for.
4	request an additional 3-month extension of time until	NOVEM	BER 15, 2011			
5 I	for calendar year $2010$ , or other tax year beginning $\_$		, and ending _			<u> </u> .
6 I	f the tax year entered in line 5 is for less than 12 months, o	check reas	on: Initial return	Final r	eturn	
	Change in accounting period					
	State in detail why you need the extension					
	ADDITIONAL TIME IS NECESSARY	TO GA	THER INFORMATION AND	FI	LE A COMPI	ETE
	AND ACCURATE TAX RETURN.	<del></del>	<del></del>			
	Sabra and least on the Form 200 BL 200 BE 200 T 4700	COCO -				
	f this application is for Form 990-BL, 990-PF, 990-T, 4720, nonrefundable credits. See instructions.	or 6069, 6	enter the tentative tax, less any	_	<u> </u>	202
-	f this application is for Form 990-PF, 990-T, 4720, or 6069	ontor onv	refundable grades and estimated	8a	\$ 1	.,393.
	ax payments made. Include any prior year overpayment al	•				
	previously with Form 8868.	ilowed as a	a credit and any amount paid	8b	\$ 2	2,748.
•	Balance due. Subtract line 8b from line 8a. Include your pa	avment wit	th this form if required by using	- OL	Ψ4	1, 1 10 1
	FTPS (Electronic Federal Tax Payment System). See instr	-	ar and form, in required, by deinig	8c	\$	0.
			d Verification		₹	
Under p	enalties of perjung, Poeciare that I have examined this form, include, correct, and complete, and that I am authorized to prepare this f	ling accomi		best o	f my knowledge and b	elief,
Signatu				Date	<b>•</b>	

Form 8868 (Rev. 1-2011)

FORM 990-PF DIVIDEND	S AND	INTER	EST FROM	SECUE	RITIES	STATEMENT	1
SOURCE		GROSS	AMOUNT		TAL GAINS	COLUMN (A) AMOUNT	)
BANK OF OKLAHOMA BANK OF OKLAHOMA	-		151. 189,746.		0. 248.	15 189,49	51.
TOTAL TO FM 990-PF, PART I, I	.n 4		189,897.		248.	189,64	19.
FORM 990-PF		LEGAL	FEES			STATEMENT	2
DESCRIPTION	EXPE	A) NSES BOOKS			(C) ADJUSTED NET INCOM		
TRUST LEGAL FEES	2	3,707.	23,	,707.			0.
TO FM 990-PF, PG 1, LN 16A =	2	3,707.	23,	,707.			0.
FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	3
	(.	A)	(B)		(C)	(D)	
DESCRIPTION	EXPE: PER	•	NET INVE		ADJUSTED NET INCOM	CHARITAE	
DESCRIPTION ACCOUNTING		NSES	NET INVE			CHARITAE	
		NSES BOOKS	NET INVE	COME		CHARITAE	S
ACCOUNTING		NSES BOOKS	MENT INC	240.		CHARITAE	0.
ACCOUNTING TO FORM 990-PF, PG 1, LN 16B	PER (	NSES BOOKS 240. 240. TAX	MENT INC	240. 240. EST-		CHARITAE E PURPOSE  STATEMENT  (D)  CHARITAE	0. 0. 4
ACCOUNTING TO FORM 990-PF, PG 1, LN 16B FORM 990-PF	PER  ( EXPE PER	NSES BOOKS 240. 240. TAX A) NSES	MENT INC	240. 240. EST-	(C) ADJUSTED	CHARITAE E PURPOSE  STATEMENT  (D)  CHARITAE	0. 0. 4
ACCOUNTING TO FORM 990-PF, PG 1, LN 16B FORM 990-PF  DESCRIPTION REAL ESTATE TAXES	PER ( EXPE PER	TAX A) NSES BOOKS  1,405.	MENT INC	240. 240. 240. EST- COME	(C) ADJUSTED	CHARITAE E PURPOSE  STATEMENT  (D)  CHARITAE	0. 0. 4

FORM 990-PF	OTHER E	XPENSES	S'	PATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TRUSTEE FEE INSURANCE EXPENSE CLASS ACTION COLLECTION FEE OSAGE PROPERTY EXPENSE MISCELLANEOUS	36,174. 130. 226. 48,397. 64.	130. 226.		0. 0. 0. 0.
TO FORM 990-PF, PG 1, LN 23	84,991.	84,991.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AUTOMATIC DATA PROCESSING INC 485 SHS	18,332.	22,446.
342430	342,430.	273,677.
BANK AMER CORP 4,416 SHS	69,881.	58,909.
BEST BUY INC 2,742 SHS	84,127.	94,023.
BP P L C ADR SPONSOR 3,668 SHS	0.	0.
COACH INC 320 SHS	6,952.	17,699.
COLGATE PALMOLIVE 150 SHS	7,796.	12,056.
DANAHER CORP 125 SHS	6,050.	11,793.
DELL COMPUTER CORP 910 SHS	21,409.	12,330.
DOW CHEMICAL CO 1,955 SHS	10,401.	66,743.
DUKE ENERGY CORP 225 SHS	2,827.	4,007.
ELECTRONIC ARTS COM 175 SHS	8,459.	2,867.
FOREST LABS INC 165 SHS	8,928.	5,277.
GOLDMAN SACHS GROUP INC 120 SHS	11,933.	20,179.
HEWLETT PACKARD COMPANY 2,455 SHS	75,477.	103,356.
HOME DEPOT INC 400 SHS	15,590.	14,024.
ISHARES DOW JONES SELECT DIV INDEX 190 SHS	10,032.	9,473.
ISHARES TR MSCI EAFE INDEX 575 SHS	34,479.	33,476.
JOHNSON & JOHNSON 5,545 SHS	351,203.	342,958.
JPMORGAN CHASE & CO 1,925 SHS	69,046.	81,659.
MOTOROLA INC 380 SHS	4,564.	3,447.
PEPSI CO INC 1290 SHS	21,491.	84,276.
SOUTHERN CO 370 SHS	10,960.	14,145.
TARGET 2,165 SHS	85,141.	130,181.
3M CO COM 260 SHS	18,068.	22,438.
UNITED TECHNOLOGIES CORP 1,840 SHS	88,005.	144,845.
VERIZON COMMUNICATIONS COM 1,015 SHS	30,610.	36,317.
WAL-MART 600 SHS	30,654.	32,358.
APACHE CORP 300 SHS	22,479.	35,769.
CISCO SYSTEMS INC 1375 SHS	36,873.	27,816.

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NIKE INC 1,600 SHS	89,127.	136,672.
EXXON MOBIL CORP 21,797 SHS	1,365,657.	1,593,797.
INTEL CORP 5,510 SHS	135,556.	115,875.
STERICYCLE INC 600 SHS	25,995.	48,552.
STRYKER CORP 300 SHS	19,715.	16,110.
THERMO FISHER SCIENTIFIC INC 500 SHS	26,220.	27,680.
COMCAST CORP CL A 763 SHS	19,406.	16,763.
APPLIED MATERIALS INC. 8,000 SH.	98,420.	112,400.
BECTON DICKINSON & CO. 300 SH.	27,094.	25,356.
BOEING CO. 200 SH.	16,870.	13,052.
BRISTOL-MYERS SQUIBB CO. 4,700 SH.	117,095.	124,456.
CVS CAREMARK CORP.400SHS	16,201.	13,908.
KOHLS CORP. 400 SH.	18,736.	21,736.
THE WALT DISNEY CO. 600 SH.	19,488.	22,506.
AT&T INC 2,787 SHARES	21,575.	81,882.
BURLINGTON NORTHERN 960 SHARES	0.	0.
DU PONT DE NEMOURS 1,178 SHARES	46,790.	58,759.
GENERAL ELECTRIC 9,860 SHARES	211,951.	180,339.
QWEST COMMUNICATIONS 1,355 SHARES	5,081.	10,311.
COCA-COLA 17,640 SHARES	778,365.	1,160,183.
CHEVRON CORP 7,347 SHARES	463,926.	670,414.
WELLS FARGO 31 SHARES	6,533.	961.
GLAXO SMITH KLINE PLC 1,000 SHARES	50,550.	39,220.
MERCK & CO 575 SHARES	16,707.	20,723.
PFIZER INC 17,389 SHARES	452,821.	304,481.
MEDCO HEALTH SOLUTIONS 288 SHARES	1.	17,646.
MICROCHIP TECHNOLOGY INC 4,100 SHARES	88,804.	140,261.
MICROSOFT CORP 3,575 SHARES	76,958.	99,778.
TJX COMPANIES INC 3,000 SHARES	86,826.	133,170.
TOTAL TO FORM 990-PF, PART II, LINE 10B	5,806,665.	6,925,535.

FORM 990-PF	OTHER ASSETS		STATEMENT 7
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
GOLDMAN SACHS FD#0527 5087SHS	39,999.	39,999.	37,132.
AMERICAN GRTH FUND #0605 1078SHS AMERICAN INVST CO FUND #0404	35,000.	35,000.	32,779.
2718SHS	80,398.	80,398.	76,431.
DODGE & COX FD#1048 5231 SHS LAZARD EMERG MKTS FD#0638 9063	0.	166,800.	186,784.
SHS	0.	166,800.	197,385.
TO FORM 990-PF, PART II, LINE 15	155,397.	488,997.	530,511.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D

STATEMENT

8

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ETTA MAY AVERY 1259 E 26TH ST TULSA, OK 74114

TELEPHONE NUMBER

(918) 742-7191

FORM AND CONTENT OF APPLICATIONS

LETTER OF REQUEST WITH DESCRIPTION OF CHARITABLE PURPOSE AND TAX EXEMPT STATUS.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE

	M 990-PF GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR		EMENT 9
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CHAMBER MUSIC TULSA TULSA, OK	N/A PERFORMING ARTS	501(C)3	5,000.
TULSA CARES TULSA, OK	N/A PERFORMING ARTS	501(C)3	2,500.
TULSA CARES TULSA, OK	N/A ANNUAL FUND	501(C)3	5,000.
THE METROPOLITAN OPERA LINCOLN CENTER NEW YORK, NY 10023	N/A PERFORMING ARTS	501(C)3	25,000.
THE SIMON ESTES FOUNDATION TULSA, OK	N/A ANNUAL FUND	501(C)3	12,000.
TULSA OPERA 1610 S BOULDER AVE TULSA, OK 74119	N/A PERFORMING ARTS	501(C)3	159,000.
TULSA ORATORIO CHORUS TULSA, OK	N/A PERFORMING ARTS	501(C)3	5,000.
TULSA SPCA TULSA, OK	N/A ANIMAL PROTECTION	501(C)3	5,000.

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TULSA SYMPHONY ORCHESTRA TULSA, OK	N/A PERFORMING ARTS	501(C)3	80,000.
MEALS ON WHEELS TULSA, OK	N/A ANNUAL FUND	501(C)3	5,000.
ANIMAL RESCUE FOUNDATION TULSA, OK	N/A ANNUAL FUND	501(C)3	5,000.
TULSA PERFORMING ARTS CENTER TRUST TULSA, OK	N/A PERFORMING ARTS	501(C)3	5,000.
CONSTATINE CENTER TULSA, OK	N/A ANNUAL FUND	501(C)3	2,500.
LOOK LIGHT OPERA TULSA, OK	N/A PERFORMING ARTS	501(C)3	15,000.
PHILBROOK MUSEUM TULSA, OK	N/A ANNUAL FUND	501(C)3	20,000.
GILCREASE MUSEUM TULSA, OK	N/A ANNUAL FUND	501(C)3	20,000.
LIGHT OPERA OKLAHOMA TULSA, OK	N/A PERFORMING ARTS	501(C)3	5,000.
CIRCLE CINEMA FOUNDATION TULSA, OK	N/A ANNUAL FUND	501(C)3	2,000.

AVERY FAMILY TRUST			73-6314003
ARTS & HUMMANITIES COUNCIL TULSA, OK	N/A PERFORMING ARTS	501(C)3	20,000.
TULSA HISTORICAL SOCIETY TULSA, OK	N/A ANNUAL FUND	501(C)3	10,000.
UP WITH TREES TULSA, OK	N/A ANNUAL FUND	501(C)3	5,000.
ROCK FIRE DEPARTMENT TULSA, OK	N/A ANNUAL FUND	501(C)3	2,500.
MENTAL HEALTH ASSOCIATION TULSA, OK	N/A ANNUAL FUND	501(C)3	5,000.
ZINK RANCH FOUNDATION			43,850.
TOTAL TO FORM 990-PF, PART XV, LINE 3A		464,350.	