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

**2010**

Department of the Treasury  
Internal Revenue Service

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

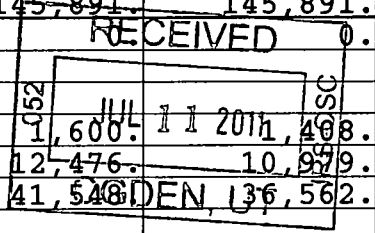
For calendar year 2010, or tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

Name of foundation <b>B.M. WOLTMAN FOUNDATION</b>		A Employer identification number <b>74-1402184</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>2525 NORTH LOOP WEST</b>	Room/suite <b>102</b>	B Telephone number <b>(713) 862-1118</b>
City or town, state, and ZIP code <b>HOUSTON, TX 77008</b>		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 5,944,262.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))</small>	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received			N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	20.	20.		STATEMENT 1
4 Dividends and interest from securities	135,326.	135,326.		STATEMENT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	9,661.			
b Gross sales price for all assets on line 6a <b>359,607.</b>		9,661.		
7 Capital gain net income (from Part IV, line 2)				
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income	884.	884.		STATEMENT 3
12 Total. Add lines 1 through 11	145,891.	145,891.		
13 Compensation of officers, directors, trustees, etc				0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees <b>STMT 4</b>	1,600.	1,408.		192.
b Accounting fees <b>STMT 5</b>	12,476.	10,979.		1,497.
c Other professional fees <b>STMT 6</b>	41,548.	36,562.		4,986.
17 Interest				
18 Taxes <b>STMT 7</b>	984.	66.		9.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses <b>STMT 8</b>	6,463.	5,687.		776.
24 Total operating and administrative expenses. Add lines 13 through 23	63,071.	54,702.		7,460.
25 Contributions, gifts, grants paid	256,013.			256,013.
26 Total expenses and disbursements. Add lines 24 and 25	319,084.	54,702.		263,473.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-173,193.			
b Net investment income (if negative, enter -0-)		91,189.		
c Adjusted net income (if negative, enter -0-)			N/A	

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	11,684.	17,810.	17,810.
	2 Savings and temporary cash investments	1,781.	3,949.	3,949.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 9	5,416,813.	5,234,974.	5,914,754.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶ STATEMENT 10)	20,968.	21,320.	7,749.
	16 Total assets (to be completed by all filers)	5,451,246.	5,278,053.	5,944,262.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
19 Deferred revenue				
20 Loans from officers, directors, trustees, and other disqualified persons				
21 Mortgages and other notes payable				
22 Other liabilities (describe ▶)				
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
27 Capital stock, trust principal, or current funds	0.	0.		
28 Paid-in or capital surplus, or land, bldg., and equipment fund	1,603,082.	1,603,082.		
29 Retained earnings, accumulated income, endowment, or other funds	3,848,164.	3,674,971.		
30 Total net assets or fund balances	5,451,246.	5,278,053.		
31 Total liabilities and net assets/fund balances	5,451,246.	5,278,053.		

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	5,451,246.
2 Enter amount from Part I, line 27a	2	-173,193.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	5,278,053.
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	5,278,053.

**Part IV Capital Gains and Losses for Tax on Investment Income**

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e <b>359,607.</b>		<b>349,946.</b>	<b>9,661.</b>

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			
b			
c			
d			
e			<b>9,661.</b>

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	<b>9,661.</b>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	<b>N/A</b>

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

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

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

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

Yes  No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	<b>295,334.</b>	<b>5,124,326.</b>	<b>.057634</b>
2008	<b>322,906.</b>	<b>5,963,350.</b>	<b>.054148</b>
2007	<b>318,181.</b>	<b>6,725,661.</b>	<b>.047309</b>
2006	<b>299,999.</b>	<b>6,354,313.</b>	<b>.047212</b>
2005	<b>275,788.</b>	<b>6,027,429.</b>	<b>.045755</b>

2 Total of line 1, column (d)	2	<b>.252058</b>
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	<b>.050412</b>
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	<b>5,615,668.</b>
5 Multiply line 4 by line 3	5	<b>283,097.</b>
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	<b>912.</b>
7 Add lines 5 and 6	7	<b>284,009.</b>
8 Enter qualifying distributions from Part XII, line 4	8	<b>263,473.</b>

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

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

Table with 11 rows for excise tax calculation. Includes sub-tables for credits (6a-6d) and a 'Refunded' amount of 3,825.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes 'Yes/No' columns and a 'N/A' entry for question 4b.

**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)			X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	X		
14	The books are in care of ▶ <u>MARY MCCANNE CURRIN, ATTORNEY</u> Telephone no. ▶ <u>713-862-1118</u> Located at ▶ <u>2525 NORTH LOOP WEST, STE. 102, HOUSTON, TX</u> ZIP+4 ▶ <u>77008</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ <u>15</u> <u>N/A</u>			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶		Yes	No
		16		X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>	1b	X
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ _____, _____, _____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <u>N/A</u>	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ _____, _____, _____, _____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010) <u>N/A</u>	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b	X

**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?  Yes  No
- (3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?  Yes  No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

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

5b  X

Organizations relying on a current notice regarding disaster assistance check here

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

Yes  No

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

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

Yes  No

6b  X

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

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

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

Yes  No

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

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		0.	0.	0.

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

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

Total number of other employees paid over \$50,000  0

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

**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 NOT APPLICABLE	0.
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 and 2.	Amount
1 NOT APPLICABLE	0.
2	
All other program-related investments. See instructions. 3 NOT APPLICABLE	0.
<b>Total.</b> Add lines 1 through 3 <span style="float: right;">▶</span>	0.

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

<b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
<b>a</b> Average monthly fair market value of securities		<b>1a</b>	5,676,334.
<b>b</b> Average of monthly cash balances		<b>1b</b>	21,347.
<b>c</b> Fair market value of all other assets		<b>1c</b>	3,505.
<b>d</b> Total (add lines 1a, b, and c)		<b>1d</b>	5,701,186.
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b> 0.		
<b>2</b> Acquisition indebtedness applicable to line 1 assets		<b>2</b>	0.
<b>3</b> Subtract line 2 from line 1d		<b>3</b>	5,701,186.
<b>4</b> Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		<b>4</b>	85,518.
<b>5</b> Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4		<b>5</b>	5,615,668.
<b>6</b> Minimum investment return. Enter 5% of line 5		<b>6</b>	280,783.

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

<b>1</b> Minimum investment return from Part X, line 6		<b>1</b>	280,783.
<b>2a</b> Tax on investment income for 2010 from Part VI, line 5	<b>2a</b> 1,824.		
<b>b</b> Income tax for 2010. (This does not include the tax from Part VI.)	<b>2b</b>		
<b>c</b> Add lines 2a and 2b		<b>2c</b>	1,824.
<b>3</b> Distributable amount before adjustments. Subtract line 2c from line 1		<b>3</b>	278,959.
<b>4</b> Recoveries of amounts treated as qualifying distributions		<b>4</b>	0.
<b>5</b> Add lines 3 and 4		<b>5</b>	278,959.
<b>6</b> Deduction from distributable amount (see instructions)		<b>6</b>	0.
<b>7</b> Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		<b>7</b>	278,959.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
<b>a</b> Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26		<b>1a</b>	263,473.
<b>b</b> Program-related investments - total from Part IX-B		<b>1b</b>	0.
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes		<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the:			
<b>a</b> Suitability test (prior IRS approval required)		<b>3a</b>	
<b>b</b> Cash distribution test (attach the required schedule)		<b>3b</b>	
<b>4</b> Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4		<b>4</b>	263,473.
<b>5</b> Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b		<b>5</b>	0.
<b>6</b> Adjusted qualifying distributions. Subtract line 5 from line 4		<b>6</b>	263,473.

**Note** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				278,959.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			247,984.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ \$ 263,473.				
a Applied to 2009, but not more than line 2a			247,984.	
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				15,489.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				263,470.
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				

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

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

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

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

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

**1 Information Regarding Foundation Managers:**

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

**NONE**

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

**NONE**

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

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

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

**SEE STATEMENT 12**

**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:







B.M. WOLTMAN FOUNDATION

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 1,624.000 SHS VANGUARD 500 INDEX TRUST FUND		VARIOUS	VARIOUS
b 1,432.000 SHS VANGUARD EXTENDED MARKET FUND		VARIOUS	VARIOUS
c 1,776.000 SHS VANGUARD SMALL CAP INDEX FUND		VARIOUS	VARIOUS
d 311.000 SHS VANGUARD 500 INDEX TRUST FUND		VARIOUS	VARIOUS
e 307.000 SHS VANGUARD EXTENDED MARKET FUND		VARIOUS	VARIOUS
f 475.000 SHS VANGUARD SMALL CAP INDEX FUND		VARIOUS	VARIOUS
g CAPITAL GAINS DIVIDENDS			
h			
i			
j			
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 169,510.		196,116.	-26,606.
b 49,082.		50,896.	-1,814.
c 51,480.		41,959.	9,521.
d 31,798.		38,313.	-6,516.
e 9,918.		11,149.	-1,230.
f 12,880.		11,513.	1,367.
g 34,939.			34,939.
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-26,606.
b			-1,814.
c			9,521.
d			-6,516.
e			-1,230.
f			1,367.
g			34,939.
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	9,661.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
INTEREST ON BANK ACCOUNTS	20.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	20.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS ON STOCKS AND MUTUAL FUNDS	170,264.	34,939.	135,325.
MONEY MARKET INTEREST	1.	0.	1.
TOTAL TO FM 990-PF, PART I, LN 4	170,265.	34,939.	135,326.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
OIL & GAS ROYALTIES & LEASE RENTAL	884.	884.	
TOTAL TO FORM 990-PF, PART I, LINE 11	884.	884.	

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX RETURN PREPARATION FEES	1,600.	1,408.		192.
TO FM 990-PF, PG 1, LN 16A	1,600.	1,408.		192.

FORM 990-PF ACCOUNTING FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AUDIT FEES	6,900.	6,072.		828.
COMPUTER ACCOUNTING FEES	5,576.	4,907.		669.
TO FORM 990-PF, PG 1, LN 16B	12,476.	10,979.		1,497.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADMINISTRATION AND OPERATIONS PROF. SERVICES FEES	41,548.	36,562.		4,986.
TO FORM 990-PF, PG 1, LN 16C	41,548.	36,562.		4,986.

FORM 990-PF TAXES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	909.	0.		0.
AD VALOREM TAX	75.	66.		9.
TO FORM 990-PF, PG 1, LN 18	984.	66.		9.

FORM 990-PF OTHER EXPENSES STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INSURANCE EXPENSE	4,036.	3,552.		484.
MISCELLANEOUS EXPENSE	1,606.	1,413.		193.
DUES AND SUBSCRIPTIONS	821.	722.		99.
TO FORM 990-PF, PG 1, LN 23	6,463.	5,687.		776.

FORM 990-PF CORPORATE STOCK STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS (STMT 14)	5,234,974.	5,914,754.
TOTAL TO FORM 990-PF, PART II, LINE 10B	5,234,974.	5,914,754.

FORM 990-PF OTHER ASSETS STATEMENT 10

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ROYALTY & MINERAL INTEREST (STMT 15)	16,581.	16,581.	3,010.
PREPAID FEDERAL EXCISE TAX	4,387.	4,739.	4,739.
TO FORM 990-PF, PART II, LINE 15	20,968.	21,320.	7,749.

FORM 990-PF

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

STATEMENT 11

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
REV. DONALD G. BLACK 2525 NORTH LOOP WEST, SUITE 102 HOUSTON, TX 77008	TRUSTEE/SECR./TREAS. 0.00	0.	0.	0.
REV. KENNETH HENNINGS 2525 NORTH LOOP WEST, SUITE 102 HOUSTON, TX 77008	TRUSTEE 0.00	0.	0.	0.
JAMES E. KELLERMAN 2525 NORTH LOOP WEST, SUITE 102 HOUSTON, TX 77008	TRUSTEE 0.00	0.	0.	0.
MARY MCCANNE CURRIN 2525 NORTH LOOP WEST, SUITE 102 HOUSTON, TX 77008	PRES./TRUSTEE 0.00	0.	0.	0.
KURT ROSENHAGEN 2525 NORTH LOOP WEST, SUITE 102 HOUSTON, TX 77008	TRUSTEE 0.00	0.	0.	0.
R. LYNN MOERS 2525 NORTH LOOP WEST, SUITE 102 HOUSTON, TX 77008	TRUSTEE 0.00	0.	0.	0.
BEN G. SCHOPPE 2525 NORTH LOOP WEST, SUITE 102 HOUSTON, TX 77008	TRUSTEE 0.00	0.	0.	0.
LOUIS L. PABOR 2525 NORTH LOOP WEST, SUITE 102 HOUSTON, TX 77008	TRUSTEE 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

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

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

LUTHERAN CHURCH - MISSOURI SYNOD  
7900 EAST HIGHWAY 290  
AUSTIN, TX 78724

TELEPHONE NUMBER

512-926-4272

FORM AND CONTENT OF APPLICATIONS

APPLICATION FORM - SEE ATTACHMENT, STATEMENT 16

ANY SUBMISSION DEADLINES

APPLICATIONS MUST BE RECEIVED BEFORE THE SCHOOL TERM BEGINS IN SUFFICIENT TIME TO BE PROCESSED.

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS FOR ASSISTANCE TO STUDENTS FROM TEXAS OR STUDENTS STUDYING IN TEXAS, WHO ARE PREPARING FOR THE LUTHERAN MINISTRY OR FOR TEACHING IN LUTHERAN SCHOOLS. GRANTS TO LUTHERAN CHURCHES, HOSPITALS, HIGH SCHOOLS OR COLLEGES IN TEXAS.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 13

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
LUTHERAN EDUCATION ASSOCIATION OF HOUSTON, HOUSTON, TX 718 F.M. 1959, SUITE B HOUSTON, TX 77034	NONE TO HIGH SCHOOL	NONE	103,788.
CONCORDIA UNIVERSITY AT AUSTIN, AUSTIN, TX 11400 CONCORDIA UNIVERSITY DR. AUSTIN, TX 78726	NONE TO COLLEGE	NONE	12,974.
LUTHERAN OUTDOORS MINISTRY OF TX, AUSTIN, TX P. O. BOX 798 HILLSBORO, TX 76645-0798	NONE TO MINISTRY TRAINING	NONE	4,325.
MINISTRY STUDENTS, CONCORDIA UNIVERSITY AT AUSTIN, AUSTIN, TX 11400 CONCORDIA UNIVERSITY DR. AUSTIN, TX 78726	NONE TO MINISTRY STUDY	NONE	32,002.
MINISTRY STUDENTS, CONCORDIA THEO. SEMINARY, FT. WAYNE, IN: 6600 NORTH CLINTON STREET FORT WAYNE, IN 46825			
PETER HAUGEN	NONE TO MINISTRY STUDY	NONE	2,542.
WILLIAM RAY	NONE TO MINISTRY STUDY	NONE	2,000.
THOMAS CHANDLER	NONE TO MINISTRY STUDY	NONE	1,700.

MINISTRY STUDENTS, CONCORDIA  
 THEO. SEMINARY, ST. LOUIS, MO:  
 801 DE MUN AVENUE ST LOUIS, MO  
 63105

ERIC BLACK	NONE TO MINISTRY STUDY	NONE	1,750.
JACOB DANDY	NONE TO MINISTRY STUDY	NONE	1,650.
THEODORE DOERING	NONE TO MINISTRY STUDY	NONE	2,883.
DERECK EVANS	NONE TO MINISTRY STUDY	NONE	1,308.
TIMOTHY FRAKER	NONE TO MINISTRY STUDY	NONE	2,300.
MICHAEL HECKMAN	NONE TO MINISTRY STUDY	NONE	3,330.
DWAYNE HENDRICKS	NONE TO MINISTRY STUDY	NONE	3,723.
JONATHAN KERN	NONE TO MINISTRY STUDY	NONE	1,739.
MICHAEL KNIPPA	NONE TO MINISTRY STUDY	NONE	1,308.

DUANE MEISSNER	NONE TO MINISTRY STUDY	NONE	2,042.
JONATHAN MISCH	NONE TO MINISTRY STUDY	NONE	2,426.
JOHN MULL	NONE TO MINISTRY STUDY	NONE	1,994.
WILLIAM J. NEWELL	NONE TO MINISTRY STUDY	NONE	1,299.
JOHN RESCHAR	NONE TO MINISTRY STUDY	NONE	2,979.
ERIK SCHMIDT	NONE TO MINISTRY STUDY	NONE	2,000.
JUSTIN SELLERS	NONE TO MINISTRY STUDY	NONE	2,852.
GARRETT SMITH	NONE TO MINISTRY STUDY	NONE	4,530.
HARRY SMITH	NONE TO MINISTRY STUDY	NONE	3,817.
KYLE SWENDIG	NONE TO MINISTRY STUDY	NONE	676.

ANDREW WALKER	NONE TO MINISTRY STUDY	NONE	1,692.
MARK WOOD	NONE TO MINISTRY STUDY	NONE	3,679.
VICTORY IN CHRIST 121 W. AURORA VISTA TRAIL AURORA, TX 76078	NONE TO CHURCH	NONE	4,216.
ZION LUTHERAN CHURCH 6001 FM 1105 GEORGETOWN, TX 78626	NONE TO CHURCH	NONE	4,216.
ASIAN CHURCH OF ALL NATIONS - CARROLLTON (POBLO TEXAS) 7611 PARK LANE DALLAS, TX 75225	NONE TO CHURCH	NONE	4,216.
ARABIC CHURCH OF ALL NATIONS - DALLAS (POBLO TEXAS) 7611 PARK LANE DALLAS, TX 75225	NONE TO CHURCH	NONE	4,216.
ASIAN CHURCH OF ALL NATIONS - ARLINGTON (POBLO TEXAS) 7611 PARK LANE DALLAS, TX 75225	NONE TO CHURCH	NONE	4,216.
WATER'S EDGE - FRISCO P. O. BOX 894 FRISCO, TX 75034	NONE TO CHURCH	NONE	4,217.
GENESIS LUTHERAN CHURCH P. O. BOX 994 BUCHANAN DAM, TX 78609-0994	NONE TO CHURCH	NONE	4,217.
ZION LUTHERAN CHURCH 907 HICKS ST. TOMBALL, TX 77375-4125	NONE TO CHURCH	NONE	4,217.

B.M. WOLTMAN FOUNDATION

74-1402184

CONCORDIA LUTHERAN HIGH SCHOOL,  
TOMBALL, TX  
700 EAST MAIN TOMBALL, TX 77375

NONE  
TO HIGH SCHOOL

NONE

12,974.

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

256,013.

B. M. WOLTMAN FOUNDATION  
74-1402184

SCHEDULE OF INVESTMENTS IN SECURITIES  
12-31-2010

STATEMENT 14

<u>MUTUAL FUNDS</u>	<u>CARRYING AMOUNT (COST)</u>	<u>QUOTED MARKET</u>
RESTRICTED FUND:		
AIM International Growth Fund	\$ 243,748	\$ 418,260
American Fd. EuroPacific Growth Fund	325,141	448,300
Vanguard Intermediate Term Inv. Gr. Fd.	169,011	172,192
Vanguard GNMA Fund	738,450	787,641
Vanguard 500 Index Fund	919,678	882,900
Vanguard Extended Market Index Fund	407,039	471,885
Vanguard Small Cap Index Fund	324,447	474,922
Vanguard Total Bond Market Index Fund	1,286,392	1,382,366
UNRESTRICTED FUND:		
AIM International Growth Fund	\$ 44,780	\$ 57,517
Vanguard Global Equity Fund	91,614	88,011
Vanguard GNMA Fund	106,926	112,095
Vanguard Intermediate Term Inv. Gr. Fd.	74,429	75,835
Vanguard 500 Index Fund	174,387	164,067
Vanguard Extended Market Index Fund	68,087	77,268
Vanguard Small Cap Index Fund	59,659	85,156
Vanguard Total Bond Market Index Fund	201,186	216,339
TOTAL MUTUAL FUNDS	\$ 5,234,974	\$ 5,914,754

B. M. WOLTMAN FOUNDATION  
74-1402184

SCHEDULE OF INVESTMENTS IN MINERAL INTERESTS  
12-31-2010

STATEMENT 15

	<u>COST OR OTHER BASIS</u>	<u>FAIR MARKET VALUE</u>
RESTRICTED FUND		
Mineral interest in 160 acres in W.C. Railroad Survey, Harris County, Texas	\$ 16,080	\$ 20
Mineral interest in 157 acres in HTC Railroad Survey, Harris County, Texas	1	10
	<u>\$ 16,081</u>	<u>\$ 30</u>
UNRESTRICTED FUND		
Royalty interest in 20 acres of Katy Field, Waller County, Texas, cost of \$17,850 fully depleted and mineral interest in 160 acres in T&P Railway Survey, Presidio County, Texas	\$ 500	\$ 2,980
	<u>\$ 500</u>	<u>\$ 2,980</u>
TOTAL Royalty and Mineral Interests	<u>\$ 16,581</u>	<u>\$ 3,010</u>



**DISTRICT FINANCIAL AID APPLICATION**  
The Lutheran Church—Missouri Synod

**\*\*\* SECTION I: To be completed by the STUDENT**

**NOTE TO STUDENT:** Your District may require additional financial and/or other information. Please comply promptly with their request in order to expedite the processing of your application.

Your Last Name		First Name	Middle Initial	Your Social Security Number	
Date of Birth	Permanent Home Address			Temporary School Address	
Telephone	City	State	Zip	City	State Zip
While in school you intend to live: _____ with parents _____ on-campus _____ off-campus			Marital Status	Total number of your dependents: _____ Spouse ( ) Children ( )	
Do you intend to enter full-time church work? _____ Yes _____ No			Major Course of Study		
Your Home District	Your Home Congregation/City			Your Pastor's Signature	
Period when you will use aid _____ to _____ mo. yr. mo. yr.		Your Signature*		Date	

\*The Financial Aid Officer has my permission to share with the District any need analysis information contained on a FAF or GAPS FAS.

**\*\*\*SECTION II: To be completed by the COLLEGE OR SEMINARY**

Name of College or Seminary		Period of District Aid	
Address		from _____ to _____ mo. yr. mo. yr.	
City State Zip Code		Student Grade Level	
Estimated Cost of Education for Aid Period	Estimated Gift Aid for Award Period	Expected Contribution Student Parents	Unmet need
Comment		Program of Study	

I hereby certify that the student named in Section I is accepted for enrollment, or is enrolled and in good standing and is making satisfactory progress.

Signature of Financial Aid Officer

Date

**\*\*\*SECTION III: To be Completed by the DISTRICT**

Amount of District aid approved	Type of District aid _____ Scholarship _____ Grant _____ Loan _____ In Service Loan
Signature of District official	Date

STUDENT: Send all copies to the Financial Aid Office.

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

- If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box [X]
If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonprofits.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only [ ]

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Form with fields: Type or print, Name of exempt organization (B.M. WOLTMAN FOUNDATION), Employer identification number (74-1402184), Number, street, and room or suite no (2525 NORTH LOOP WEST, NO. 102), City, town or post office, state, and ZIP code (HOUSTON, TX 77008)

Enter the Return code for the return that this application is for (file a separate application for each return) [0][4]

Table with 4 columns: Application Is For, Return Code, Application Is For, Return Code. Rows include Form 990, Form 990-BL, Form 990-EZ, Form 990-PF, Form 990-T (sec. 401(a) or 408(a) trust), and Form 990-T (trust other than above).

MARY MCCANNE CURRIN, ATTORNEY

The books are in the care of [ ] 2525 NORTH LOOP WEST, STE. 102 - HOUSTON, TX 77008. Telephone No. [ ] 713-862-1118 FAX No [ ] 713-513-5780

- If the organization does not have an office or place of business in the United States, check this box [ ]
If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) [ ] . If this is for the whole group, check this box [ ] . If it is for part of the group, check this box [ ] and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2011, to file the exempt organization return for the organization named above. The extension is for the organization's return for: [X] calendar year 2010 or [ ] tax year beginning [ ] and ending [ ]

2 If the tax year entered in line 1 is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

Table with 3 columns: Description, 3a, 3b, 3c. Rows include: 3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions. 3a \$ 2,325. 3b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. 3b \$ 5,649. 3c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. 3c \$ 0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

LHA For Paperwork Reduction Act Notice, see Instructions.