Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning , 2010, and ending , 20

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
H.E. STUMBERG, SR. ORPHANS, CRIPPLED
CHILDREN, & HANDICAPPED PERSONS TRUST

A Employer identification number
74-6063272

Number and street (or P O box number if mail is not delivered to street address) Room/suite
227 W. OLMOS DRIVE

B Telephone number (see page 10 of the instructions)
(210) 271-0448

City or town, state, and ZIP code
SAN ANTONIO, TX 78212

C If exemption application is pending, check here ▶ ☐
D 1 Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶ $ 2,183,447.

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	0.			
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	83.	83.		ATCH 1
	4	Dividends and interest from securities	40,760.	40,760.		ATCH 2
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	19,732.			
	b	Gross sales price for all assets on line 6a 916,374.				
	7	Capital gain net income (from Part IV, line 2)		19,732.		
	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) (attach schedule)				
	11	Other income (attach schedule)	820.	820.		ATCH 3
	12	**Total** Add lines 1 through 11	61,395.	61,395.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) ATCH 4	4,300.	2,150.	0.	2,150.
	c	Other professional fees (attach schedule) *	7,194.	6,317.	0.	877.
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions) **	566.	566.	0.	0.
	19	Depreciation (attach schedule) and depletion	1,706.	1,706.	0.	
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	13,766.	10,739.	0.	3,027.
	25	Contributions, gifts, grants paid	115,900.			115,900.
	26	**Total expenses and disbursements** Add lines 24 and 25	129,666.	10,739.	0.	118,927.
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-68,271.			
	b	**Net investment income** (if negative, enter -0-)		50,656.		
	c	**Adjusted net income** (if negative, enter -0-).				

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Part II Balance Sheets

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	63,470.	72,272.	72,272.
	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 (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10 a	Investments - U S and state government obligations (attach schedule) **	372,166.	214,854.	219,040.
	b	Investments - corporate stock (attach schedule) ATCH 8	1,539,417.	1,619,656.	1,892,135.
	c	Investments - corporate bonds (attach schedule)			
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule)			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	1,975,053.	1,906,782.	2,183,447.
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)		0.	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ ☒			
	27	Capital stock, trust principal, or current funds	1,975,053.	1,906,782.	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	1,975,053.	1,906,782.	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	1,975,053.	1,906,782.	

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	1,975,053.
2	Enter amount from Part I, line 27a	2	-68,271.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,906,782.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,906,782.

**ATCH 7

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	SEE PART IV SCHEDULE			
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				

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				

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	19,732.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	118,421.	1,825,965.	0.064854
2008	110,454.	2,290,026.	0.048233
2007	111,394.	2,571,920.	0.043312
2006	113,958.	2,360,519.	0.048277
2005	114,625.	2,292,116.	0.050008

2 **Total** of line 1, column (d)	2	0.254684
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.050937
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	2,030,935.
5 Multiply line 4 by line 3	5	103,450.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	507.
7 Add lines 5 and 6	7	103,957.
8 Enter qualifying distributions from Part XII, line 4	8	118,927.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter: ____________ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b	1	507.
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	507.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	507.
6	Credits/Payments		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 6a — 340.		
b	Exempt foreign organizations-tax withheld at source — 6b — 0.		
c	Tax paid with application for extension of time to file (Form 8868) — 6c — 300.		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	640.
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	133.
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ 133. **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

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

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ DIANA M. STUMBERG Telephone no ▶ 210-271-0448

Located at ▶ 227 W. OLMOS DRIVE SAN ANTONIO, TX ZIP + 4 ▶ 78212

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

			Yes	No
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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? ☐ Yes ☒ 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 page 22 of the instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ __________ , __________ , _________ , _________			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2010 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010)*	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)? (see page 22 of the instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b**

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? ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATTACHMENT 9		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE		0.	0.	0.

Total number of other employees paid over $50,000 ▶ NONE

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		NONE

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	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions 3 NONE	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes		
a	Average monthly fair market value of securities	1a	1,982,810.
b	Average of monthly cash balances	1b	79,053.
c	Fair market value of all other assets (see page 25 of the instructions)	1c	0.
d	**Total** (add lines 1a, b, and c)	1d	2,061,863.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,061,863.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	30,928.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,030,935.
6	**Minimum investment return.** Enter 5% of line 5	6	101,547.

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

1	Minimum investment return from Part X, line 6			1	101,547.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	507.		
b	Income tax for 2010 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	507.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	101,040.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	101,040.
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	101,040.

Part XII Qualifying Distributions(see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	118,927.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	0.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	118,927.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	507.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	118,420.

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

Part XIII Undistributed Income (see page 26 of the instructions)

			(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1	Distributable amount for 2010 from Part XI, line 7					101,040.
2	Undistributed income, if any, as of the end of 2010					
a	Enter amount for 2009 only				86,143.	
b	Total for prior years 20 08 ,20 07 ,20 06			1,893.		
3	Excess distributions carryover, if any, to 2010					
a	From 2005					
b	From 2006	0.				
c	From 2007	0.				
d	From 2008	0.				
e	From 2009	0.				
f	**Total** of lines 3a through e		0.			
4	Qualifying distributions for 2010 from Part XII, line 4 ▶ $ 118,927.					
a	Applied to 2009, but not more than line 2a				86,143.	
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)			1,893.		
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)					
d	Applied to 2010 distributable amount					30,891.
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					
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					
d	Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions					
e	Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions					
f	Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011					70,149.
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)					
8	Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)					
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	0.				
c	Excess from 2008	0.				
d	Excess from 2009	0.				
e	Excess from 2010	0.				

Part XIV **Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

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

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

Part XV **Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year - see page 28 of the instructions.)**

1 **Information Regarding Foundation Managers:**

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

LOUIS H. STUMBERG

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 page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

ATTACHMENT 10

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

ATTACHMENT 11

c Any submission deadlines

APPLICATIONS SHOULD BE SUBMITTED BY NOVEMBER

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

ATTACHMENT 12

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ATTACHMENT 13				
Total . . . . ▶ **3a**				115,900.
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	83.	
4 Dividends and interest from securities			14	40,760.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			15	820.	
8 Gain or (loss) from sales of assets other than inventory			18	19,732.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				61,395.	

13 Total. Add line 12, columns (b), (d), and (e) . . . . . . 13 61,395.

(See worksheet in line 13 instructions on page 29 to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions)
N/A	NOT APPLICABLE

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

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

Sign Here

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

Signature of officer or trustee | Date 8/9/2011 | Title Trustee

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
STEWART GOODSON	Stewart Goodson, CPA	08/03/2011		

Firm's name ▶ ERNST & YOUNG U.S. LLP
Firm's EIN ▶ 34-6565596
Firm's address ▶ P.O. BOX 2938
SAN ANTONIO, TX 78299-2938
Phone no 210-228-9696

ATTACHMENT 1

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
SHORT TERM PRIME INTEREST INCOME		83.	83.
	TOTAL	83.	83.

ATTACHMENT 2

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INCOME FROM SECURITIES		40,760.	40,760.
	TOTAL	40,760.	40,760.

H.E. STUMBERG, SR. ORPHANS, CRIPPLED 74-6063272

ATTACHMENT 3

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
ROYALTY INCOME		820.	820.
	TOTALS	820.	820.

H.E. STUMBERG, SR. ORPHANS, CRIPPLED 74-6063272

ATTACHMENT 4

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ERNST AND YOUNG, LLP	4,300.	2,150.		2,150.
TOTALS	4,300.	2,150.	0.	2,150.

ATTACHMENT 5

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
FROST BANK MANAGEMENT FEES	974.	97.	0.	877.
INVESTMENT MANAGEMENT FEES	6,220.	6,220.	0.	0.
TOTALS	7,194.	6,317.	0.	877.

ATTACHMENT 6

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
FOREIGN TAXES PAID	453.	453.	0.	0.
ESTIMATED TAX PAYMENTS	113.	113.	0.	0.
TOTALS	566.	566.	0.	0.

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

ATTACHMENT 7

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
FROST LOW DURATION BOND FD	60,000.	59,427.
FROST TOTAL RETURN BOND FUND	102,414.	104,258.
PIMCO TOTAL RETURN INSTL CLASS	52,440.	55,355.
US OBLIGATIONS TOTAL	214,854.	219,040.

H.E. STUMBERG, SR. ORPHANS, CRIPPLED 74-6063272

ATTACHMENT 8

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
STOCKS AND EQUITY FUNDS - 5799	748,590.	811,026.
STOCKS AND EQUITY FUNDS-579901	859,077.	1,073,088.
SAN JUAN BASIN ROYALTY TRUST	15,428.	11,460.
LESS: ACCUM DEPLETION	-3,439.	-3,439.
TOTALS	1,619,656.	1,892,135.

H.E. STUMBERG, SR. ORPHANS, CRIPPLED 74-6063272

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 9

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
LOUIS H. STUMBERG TOWER LIFE BUILDING, SUITE 701 SAN ANTONIO, TX 78205	TRUSTEE 1.00	0.	0.	0.
BELLE BERG 227 W. OLMOS DRIVE SAN ANTONIO, TX 78212	TRUSTEE 1.00	0.	0.	0.
LOUIS H. STUMBERG, JR. 227 W. OLMOS DRIVE SAN ANTONIO, TX 78212	TRUSTEE 1.00	0.	0.	0.
	GRAND TOTALS	0.	0.	0.

ATTACHMENT 10

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

L. HERBERT STUMBERG, JR.
227 W. OLMOS DRIVE
SAN ANTONIO, TX 78212

ATTACHMENT 11

990PF, PART XV - FORM AND CONTENTS OF SUBMITTED APPLICATIONS

APPLICATIONS SHOULD BE SUBMITTED IN LETTER FORM OUTLINING THE NEED OF APPLICANT

990PF, PART XV - RESTRICTIONS OR LIMITATIONS ON AWARDS

AWARDS ARE LIMITED TO ORGANIZATIONS SERVING HANDICAPPED & CRIPPLED CHILDREN OR PERSONS IN THE BEXAR COUNTY AREA.

H.E. STUMBERG, SR. ORPHANS, CRIPPLED CHILDREN, AND
HANDICAPPED PERSONS TRUST
SAN ANTONIO, TEXAS 78205

ATTACHMENT 13

74-6063272

DECEMBER 31, 2010

SCHEDULE OF CHARITABLE CONTRIBUTIONS

Recipient	Address	Purpose	Amount
Alzafar Shrine Crippled Children	901 N Loop 1604 W San Antonio, Texas 78232	Charitable	$10,000
Any Baby Can	217 Howard San Antonio, Texas 78212	Charitable	$1,000
The Arc of San Antonio, Inc.	13430 West Ave San Antonio, Texas 78216	Charitable	$2,000
Baptist Children's Home Ministries	909 NE Loop 410, Suite 800 San Antonio, Texas 78209	Charitable	$2,000
Barrio Comprehensive Family Health Care Center	3066 E. Commerce San Antonio, Texas 78220	Charitable	$1,000
Boy Scouts of America - Alamo Area	2226 N.W. Military Hwy. San Antonio, Texas 78213	Charitable	$15,000
Brighton School	14207 Higgins San Antonio, Texas 78217	Charitable	$2,000
Camp John Marc	2824 Swiss Ave. Dallas, Texas 75204	Charitable	$6,000
Central Catholic High School	1403 N St Mary's Street San Antonio, Texas 78215	Charitable	$6,000
Child Guidance Center	2135 Babcock Road San Antonio, TX 78229	Charitable	$2,000
Children's Association for Maximum Potential	P.O Box 27086 San Antonio, Texas 78227	Charitable	$2,000
Children's Shelter	1209 S. St. Mary's Street San Antonio, Texas 78210	Charitable	$3,600
Center for Health Care Services	3031 IH10 West San Antonio, TX 78201	Charitable	$2,000
Easter Seals	2203 Babcock San Antonio, Texas 78229	Charitable	$4,000
Guide Dogs of Texas, Inc.	1503 Allena Drive San Antonio, TX 78213	Charitable	$2,500
Girl Scouts of America - Alamo Area	P.O 790339 San Antonio, Texas 78279	Charitable	$2,000
March of Dimes	7400 Blanco San Antonio, Texas 78216	Charitable	$5,000
Medical Equipment Network (Project Mend)	1201 Austin St. San Antonio, Texas 78208	Charitable	$2,000
Misson Road Development Center	8706 Mission Road San Antonio, Texas 78214	Charitable	$10,000
Muscular Dystrophy	8610 Broadway #200 San Antonio, Texas 78217	Charitable	$1,500
Nonprofit Resource Center of Texas	100 Broadway San Antonio, Texas 78205	Charitable	$300

H E. STUMBERG, SR. ORPHANS, CRIPPLED CHILDREN, AND
HANDICAPPED PERSONS TRUST
SAN ANTONIO, TEXAS 78205

ATTACHMENT 13

74-6063272

DECEMBER 31, 2010

SCHEDULE OF CHARITABLE CONTRIBUTIONS

Recipient	Address	Purpose	Amount
Palmer Drug Abuse Center	P.O Box 782155 San Antonio, Texas 78278	Charitable	$4,000
The Patrician Movement	222 E. Mitchell San Antonio, Texas 78210	Charitable	$3,000
Prevent Blindness	2929 Mossrock #203 San Antonio, Texas 78230	Charitable	$2,000
Texas Scottish Rite Hospital for Crippled Children	2222 Welborn Street Dallas, Texas 75219	Charitable	$20,000
Volunteer Services Council for the S A State School	P.O Box 14700 San Antonio, Texas 78214	Charitable	$1,000
YMCA of Greater San Antonio	3233 N. St. Mary's Street San Antonio, TX 78212-3579	Charitable	$2,000
Youth Alternatives	3103 West Ave San Antonio, Texas 78213	Charitable	$2,000
TOTAL CONTRIBUTIONS			$115,900

H.E. STUMBERG, SR. ORPHANS, CRIPPLED CHILDREN, & HANDICAPPED PERSONS TRUST
EIN: 74-6063272
Form 990-PF, Part I, Line 19

San Juan Basin Royalty Trust

Units	Original Basis	Depletion Allowed in PY	Adjusted Basis	Unit Factor	Cost Depletion
289	11,376.57	1,577.84	9,798.73	0.124548	1,220.41
82	2,269.91	155.38	2,114.53	0.124548	263.36
89	1,362.41	0.00	1,362.41	0.124548	169.69
27	419.58	0.00	419.58	0.124548	52.26
					1,705.72

H E STUMBERG, SR ORPHANS, CRIPPLED 74-6063272

Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
ST SALES THRU FROST 579900 - SEE ATTACHMENT	VAR	VAR	70,049.	66,345	3,704
ST SALES THRU FROST 579901 - SEE ATTACHMENT	VAR	VAR	149,337	150,130	-793
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			219,386	216,475	2,911.
Totals			219,386	216,475	2,911

JSA
0F0971 2 000

H E STUMBERG, SR. ORPHANS, CRIPPLED 74-6063272 74-6063272

Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
LT SALES THRU FROST 579900 - SEE ATTACHMENT	VAR	VAR	500,000	526,726	-26,726.
LT SALES THRU FROST 579901 - SEE ATTACHMENT	VAR	VAR	181,726	153,441	28,285
LT CAPITAL GAIN DISTRIBUTIONS THRU FROST 579900	VAR	VAR	15,262		15,262
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			696,988	680,167	16,821
			696,988		
Totals				680,167	16,821

JSA
0F0970 2 000

ATTACHMENT 2

2010 Tax Information Statement

Account Number: F0579900
Recipient's Tax ID Number: 74-6063272
Payer's Federal ID Number: 74-6036463
☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
H E STUMBERG SR ORPH, CRIP CHILD
AND HANDICAPPED PERSONS TRUST
100 W HOUSTON ST SUITE 1800
SAN ANTONIO, TX 78205

Payer's Name and Address:
FROST NATIONAL BANK TRUSTEE
P O BOX 2950
SAN ANTONIO, TX 78299

2010 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Short Term Sales Reported on 1099-B								
4854.3690	00766Y786	FROST LOW DURATION MUNI BOND FD I*	12/18/2009	02/22/2010	50,048.55	50,000.00	48.55	0.00
339.9630	779556109	T ROWE PRICE MID-CAP GROWTH FUND*	02/22/2010	12/22/2010	20,000 00	16,345.42	3,654.58	0.00
Total Short Term Sales Reported on 1099-B					**70,048.55**	**66,345.42**	**3,703.13**	**0.00**
Long Term 15% Sales Reported on 1099-B								
3690.0370	00766Y877	FROST CORE GROWTH EQUITY FD INSTL*	VARIOUS	02/01/2010	30,000.00	39,299.92	-9,299.92	0.00
9367.6820	00766Y869	FROST DIVIDEND VALUE EQUITY FD INS*	04/03/2007	10/27/2010	80,000.00	96,786.33	-16,786.33	0.00
12300.1230	00766Y836	FROST INTERNATIONAL EQUITY FD INST*	VARIOUS	04/07/2010	100,000.00	95,636.16	4,363.84	0.00
6802.7210	00766Y836	FROST INTERNATIONAL EQUITY FD INST*	VARIOUS	06/03/2010	50,000.00	57,843.76	-7,843.76	0.00
3276 5400	00766Y836	FROST INTERNATIONAL EQUITY FD INST*	01/26/2005	06/21/2010	25,000.00	28,016.43	-3,016.43	0.00
2652.5200	00766Y836	FROST INTERNATIONAL EQUITY FD INST*	01/26/2005	06/22/2010	20,000.00	22,680.68	-2,680.68	0.00
2239.6430	00766Y836	FROST INTERNATIONAL EQUITY FD INST*	01/26/2005	12/22/2010	20,000.00	19,150 32	849.68	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2010 Tax Information Statement

Ref: 6

Account Number: F0579900
Recipient's Tax ID Number: 74-6063272
Payer's Federal ID Number: 74-6036463

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
H E STUMBERG SR ORPH, CRIP CHILD
AND HANDICAPPED PERSONS TRUST
100 W HOUSTON ST SUITE 1800
SAN ANTONIO, TX 78205

Payer's Name and Address:
FROST NATIONAL BANK TRUSTEE
P O BOX 2950
SAN ANTONIO, TX 78299

Number of shares	CUSIP *(Box 1b)*	Description *(Box 7)*	Date Acquired	Date of Sale *(Box 1a)*	Stocks Bonds, etc. *(Box 2)*	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*
4633.9200	00766Y810	FROST TOTAL RETURN BOND FUND INSTL*	03/04/1999	12/02/2010	50,000.00	47,568.00	2,432.00	0.00
4340.2780	693390700	PIMCO TOTAL RETURN INSTL CLASS*	05/15/2008	11/18/2010	50,000.00	47,265.63	2,734.37	0.00
3064.7990	693390700	PIMCO TOTAL RETURN INSTL CLASS*	VARIOUS	12/02/2010	35,000.00	33,220.25	1,779.75	0.00
2780.3520	693390700	PIMCO TOTAL RETURN INSTL CLASS*	06/25/2008	12/13/2010	30,000.00	29,443.93	556.07	0.00
926.7840	693390700	PIMCO TOTAL RETURN INSTL CLASS*	06/25/2008	12/22/2010	10,000.00	9,814.64	185.36	0.00
Total Long Term 15% Sales Reported on 1099-B					**500,000.00**	**526,726.05**	**-26,726.05**	**0.00**

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2010 Tax Information Statement

Payer's Name and Address:
FROST NATIONAL BANK TRUSTEE
P O BOX 2950
SAN ANTONIO, TX 78299

Account Number: F0579901
Recipient's Tax ID Number: 74-6063272
Payer's Federal ID Number: 74-6036463
☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
H E STUMBERG SR ORPH, CRIP CHILD
AND HANDICAPPED PERSONS TRUST
100 W HOUSTON ST SUITE 1800
SAN ANTONIO, TX 78205

2010 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Short Term Sales Reported on 1099-B								
1079.0000	16945R104	CHINA UNICOM (HONG KONG) LTD ADR	VARIOUS	02/03/2010	12,172.90	14,871.90	-2,699.00	0.00
174.0000	17275R102	CISCO SYSTEM INC COM*	10/15/2009	09/16/2010	3,804.20	4,228.11	-423.91	0.00
1043 0000	218868107	CORINTHIAN COLLEGES INC COM	02/09/2010	06/03/2010	13,353.51	13,956 91	-603.40	0.00
.4660	247916208	DENBURY RESOURCES INC (HOLDING COMP)	03/12/2010	03/29/2010	7.13	7.14	-0.01	0.00
57 0000	29364G103	ENTERGY CORP NEW COM	12/11/2009	10/06/2010	4,369.31	4,694.50	-325.19	0.00
318.0000	26884L109	EQT CORPORATION COM	09/08/2009	05/17/2010	13,038.83	13,023.12	15.71	0.00
138 0000	369550108	GENERAL DYNAMICS CORP COM*	12/11/2009	08/12/2010	8,372.47	9,466.77	-1,094.30	0.00
79.0000	415864107	HARSCO CORPORATION COM	07/07/2009	02/11/2010	2,256.91	2,193.04	63.87	0.00
316.0000	579064106	MCAFEE INC COM*	VARIOUS	01/08/2010	12,675 16	13,045.54	-370.38	0.00
274.0000	58155Q103	MCKESSON CORPORATION COM	05/21/2009	03/02/2010	16,920.63	11,044 44	5,876.19	0.00
1024.0000	65248E104	NEWS CORP CLASS A COM	VARIOUS	12/03/2010	14,550.89	13,857.92	692.97	0.00
333.0000	670346105	NUCOR CORP COM*	03/23/2010	10/28/2010	12,603.54	15,357.99	-2,754.45	0.00
180.0000	89417E109	TRAVELERS COMPANIES INC COM *	09/21/2009	05/12/2010	9,002.62	8,497.80	504 82	0.00
.4000	910047109	UNITED CONTINENTAL HLDGS INC COM	11/23/2009	10/13/2010	9.91	5.03	4.88	0.00
771.0000	91913Y100	VALERO ENERGY CORP NEW COM*	01/29/2010	04/21/2010	14,760.62	14,569.90	190.72	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2010 Tax Information Statement

Account Number: F0579901
Recipient's Tax ID Number: 74-6063272
Payer's Federal ID Number: 74-6036463

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
H E STUMBERG SR ORPH, CRIP CHILD
AND HANDICAPPED PERSONS TRUST
100 W HOUSTON ST SUITE 1800
SAN ANTONIO, TX 78205

Payer's Name and Address:
FROST NATIONAL BANK TRUSTEE
P O BOX 2950
SAN ANTONIO, TX 78299

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
386.0000	931422109	WALGREEN CO COM*	07/07/2009	06/14/2010	11,438.80	11,309.80	129.00	0.00
Total Short Term Sales Reported on 1099-B					**149,337.43**	**150,129.91**	**-792.48**	**0.00**
Long Term 15% Sales Reported on 1099-B								
203.0000	002824100	ABBOTT LABORATORIES COM*	02/27/2008	11/19/2010	9,577.95	11,143.38	-1,565.43	0.00
182.0000	075887109	BECTON DICKINSON & CO COM*	VARIOUS	08/31/2010	12,459.02	14,213.46	-1,754.44	0.00
221.0000	138006309	CANON INC ADR	04/02/2009	07/08/2010	8,601.22	6,842.16	1,759 06	0 00
383.0000	17275R102	CISCO SYSTEM INC COM*	VARIOUS	09/16/2010	8,373.62	8,849.05	-475.43	0.00
164.0000	194162103	COLGATE-PALMOLIVE CO COM*	09/27/2007	01/27/2010	13,128.02	11,779.91	1,348.11	0.00
59.0000	254687106	DISNEY (WALT) COMPANY HOLDING CO *	06/22/2006	03/11/2010	1,982.66	1,711.74	270.92	0.00
234.0000	278865100	ECOLAB INC COM*	02/05/2008	03/18/2010	10,105.75	11,257.65	-1,151.90	0.00
347.0000	29255W100	ENCORE ACQUISITION CO COM	10/05/2007	03/16/2010	17,223.07	12,018.07	5,205.00	0.00
.8147	35906A108	FRONTIER COMMUNICATIONS CORP COM	08/30/2007	07/20/2010	5.97	8.80	-2.83	0.00
88.0000	35906A108	FRONTIER COMMUNICATIONS CORP COM	VARIOUS	08/25/2010	660.87	879.39	-218.52	0.00
313.0000	415864107	HARSCO CORPORATION COM	12/19/2008	02/11/2010	8,941.92	8,232.65	709.27	0.00
486.0000	438128308	HONDA MOTOR CO LTD SPONSORED ADR	06/22/2006	02/05/2010	16,562.91	15,420.78	1,142.13	0.00
630.0000	680665205	OLIN CORP COM	07/07/2009	10/29/2010	12,603.49	7,182.00	5,421.49	0.00
430.0000	808513105	SCHWAB CHARLES CORP NEW COM*	03/30/2009	04/01/2010	7,930.75	6,346.80	1,583.95	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2010 Tax Information Statement

Ref: 6

Account Number: F0579901
Recipient's Tax ID Number: 74-6063272
Payer's Federal ID Number: 74-6036463
☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
H E STUMBERG SR ORPH, CRIP CHILD
AND HANDICAPPED PERSONS TRUST
100 W HOUSTON ST SUITE 1800
SAN ANTONIO, TX 78205

Payer's Name and Address:
FROST NATIONAL BANK TRUSTEE
P O BOX 2950
SAN ANTONIO, TX 78299

Number of shares	CUSIP *(Box 1b)*	Description *(Box 7)*	Date Acquired	Date of Sale *(Box 1a)*	Stocks Bonds, etc. *(Box 2)*	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*
199.0000	790849103	ST. JUDE MEDICAL INC COM*	02/05/2009	06/01/2010	7,295.58	7,422.36	-126.78	0.00
124.0000	855244109	STARBUCKS CORP COM*	07/15/2009	12/02/2010	4,037.14	1,774.30	2,262.84	0.00
674 0000	87236Y108	TD AMERITRADE HLDG CORP COM	06/22/2006	08/04/2010	10,686.43	10,427 62	258.81	0.00
156.0000	879382208	TELEFONICA S A SPONSORED ADR	VARIOUS	09/02/2010	10,682.06	9,844.18	837.88	0.00
426.0000	969904101	WILLIAMS SONOMA INC COM	12/05/2008	02/09/2010	8,293 77	3,848.19	4,445.58	0.00
473.0000	969904101	WILLIAMS SONOMA INC COM	VARIOUS	03/23/2010	12,573.78	4,238.08	8,335.70	0.00
Total Long Term 15% Sales Reported on 1099-B					**181,725.98**	**153,440.57**	**28,285.41**	**0.00**

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Election Permitting Private Foundation to Avoid Excise Tax for Failure to Distribute Income
IRC Section 4942(h)(2)

Section 4942(h)(2) Election

THE FOUNDATION, elects pursuant to Section 4942(h)(2) of the Internal Revenue Code and Reg.§ 53.4942(a)-3(d)(2) to treat qualifying distributions for the current tax year ended 12/31/2010, in excess of the undistributed income of the immediately preceding taxable year as being made from the UNDISTRIBUTED INCOME FROM PRIOR YEARS as follows:

Income	Tax Year	Amount
2007 INCOME	2007	1,893.
Total		1,893.

Trustee
Signature of Officer, Director or Trustee

Title: Trustee

Date: 8/19/2011

Form **8868**
(Rev January 2011)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

▶ **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 . . . . ▶ ☒
- 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.

Type or print File by the due date for filing your return See instructions	Name of exempt organization H.E. STUMBERG, SR. ORPHANS, CRIPPLED CHILDREN, & HANDICAPPED PERSONS TRUST	**Employer identification number** 74-6063272
	Number, street, and room or suite no If a P O box, see instructions 227 W. OLMOS DRIVE	
	City, town or post office, state, and ZIP code For a foreign address, see instructions SAN ANTONIO, TX 78212	

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

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ DIANA M. STUMBERG

Telephone No ▶ 210 271-0448 FAX No. ▶

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15 , 20 11 , to file the exempt organization return for the organization named above The extension is for the organization's return for

▶ ☒ calendar year 20 10 or

▶ ☐ tax year beginning ________, 20 ___, and ending ________, 20 ___

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

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	$ 640.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit	3b	$ 340.
c	**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	$ 300.

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

For Paperwork Reduction Act Notice, see Instructions.