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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>CARL C ANDERSON AND MARIE JO ANDERSON CHARITABLE FOUNDATION</b>		A Employer identification number <b>74-6078530</b>
Number and street (or P O box number if mail is not delivered to street address) <b>BANK OF AMERICA, N.A. P.O. BOX 831041</b>	Room/suite	B Telephone number <b>800-357-7094</b>
City or town, state, and ZIP code <b>DALLAS, TX 75283-1041</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>\$ 66,438,234.</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"/>
(Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				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		6.	6.		STATEMENT 1
4 Dividends and interest from securities		1,793,466.	1,793,466.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		2,480,025.			
b Gross sales price for all assets on line 6a <b>43,598,131.</b>					
7 Capital gain net income (from Part IV, line 2)			2,480,025.		
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		54,336.	54,336.		STATEMENT 3
12 Total. Add lines 1 through 11		4,327,833.	4,327,833.		
13 Compensation of officers, directors, trustees, etc		339,217.	72,780.		266,437.
14 Other employee salaries and wages		109,707.	0.		109,707.
15 Pension plans, employee benefits		65,536.	0.		65,536.
16a Legal fees STMT 4		376.	0.		376.
b Accounting fees STMT 5		16,660.	0.		16,660.
c Other professional fees					
17 Interest					
18 Taxes STMT 6		58,515.	39,632.		18,883.
19 Depreciation and depletion		3,274.	0.		
20 Occupancy		36,929.	0.		36,929.
21 Travel, conferences, and meetings		13,096.	0.		13,096.
22 Printing and publications		623.	0.		623.
23 Other expenses STMT 7		381,640.	355,640.		26,000.
24 Total operating and administrative expenses. Add lines 13 through 23		1,025,573.	468,052.		554,247.
25 Contributions, gifts, grants paid		3,219,850.			3,219,850.
26 Total expenses and disbursements. Add lines 24 and 25		4,245,423.	468,052.		3,774,097.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		82,410.			
b Net investment income (if negative, enter -0-)			3,859,781.		
c Adjusted net income (if negative, enter -0-)				N/A	

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<b>Part II Balance Sheets</b> 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
<b>Assets</b>	1 Cash - non-interest-bearing	83,578.	45,312.	45,312.
	2 Savings and temporary cash investments	1,593,294.	2,212,442.	2,212,687.
	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>STMT 9</b>	9,030,566.	26,201,066.	31,040,532.
	b Investments - corporate stock <b>STMT 10</b>	35,032,756.	12,898,111.	15,365,429.
	c Investments - corporate bonds <b>STMT 11</b>	7,538,387.	16,371,878.	16,945,670.
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other <b>STMT 12</b>	4,843,969.	536,832.	814,562.	
14 Land, buildings, and equipment basis ▶ <b>24,124.</b>				
Less: accumulated depreciation <b>STMT 13 ▶ 12,882.</b>	11,640.	11,242.	11,242.	
15 Other assets (describe ▶ <b>SECURITY DEPOSIT</b> )	2,800.	2,800.	2,800.	
<b>16 Total assets (to be completed by all filers)</b>	<b>58,136,990.</b>	<b>58,279,683.</b>	<b>66,438,234.</b>	
<b>Liabilities</b>	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 ▶)			
<b>23 Total liabilities (add lines 17 through 22)</b>	<b>0.</b>	<b>0.</b>		
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>			
	<b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>			
	<b>and complete lines 27 through 31.</b>			
	27 Capital stock, trust principal, or current funds	58,136,990.	58,279,683.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	0.	0.		
<b>30 Total net assets or fund balances</b>	<b>58,136,990.</b>	<b>58,279,683.</b>		
<b>31 Total liabilities and net assets/fund balances</b>	<b>58,136,990.</b>	<b>58,279,683.</b>		

**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	58,136,990.
2 Enter amount from Part I, line 27a	2	82,410.
3 Other increases not included in line 2 (itemize) ▶ <b>SEE STATEMENT 8</b>	3	60,303.
4 Add lines 1, 2, and 3	4	58,279,703.
5 Decreases not included in line 2 (itemize) ▶ <b>NONDEDUCTIBLE TRUST EXPENSES</b>	5	20.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	58,279,683.

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**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 ATTACHMENT		P	VARIOUS	VARIOUS
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 43,598,131.			2,480,025.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) 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			2,480,025.
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	2,480,025.
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

**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	3,881,962.	53,183,299.	.072992
2008	4,783,120.	71,022,883.	.067346
2007	3,494,585.	84,584,980.	.041314
2006	2,849,420.	63,889,206.	.044599
2005	2,760,685.	57,316,702.	.048165

2 Total of line 1, column (d)	2	.274416
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	.054883
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	57,761,282.
5 Multiply line 4 by line 3	5	3,170,112.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	38,598.
7 Add lines 5 and 6	7	3,208,710.
8 Enter qualifying distributions from Part XII, line 4 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.	8	3,774,097.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	38,598.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	38,598.
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	38,598.
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a	39,230.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	10,000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	49,230.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	10,632.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax <input checked="" type="checkbox"/> 10,632. Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			X
1c Did the foundation file Form 1120-POL for this year?			X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 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 instructions) <u>NM, TX</u>			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ► N/A

14 The books are in care of ► BRADFORD H. ROBB Telephone no. ► 512-458-2285  
 Located at ► 114 W. 7TH STREET, SUITE 1200, AUSTIN, TX ZIP+4 ► 78701

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐  
 and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

16 At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? ☐ Yes ☒ No  
 See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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 type="checkbox"/> Yes <input checked="" 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		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?		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.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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**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)?

N/A

5b

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

N/A

☐ Yes ☐ No

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

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

6b

X

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

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 14		339,217.	39,275.	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
SHERRILL GERATY - 114 WEST 7TH STREET, SUITE 1200, AUSTIN, TX 78701	GRANT MANAGER 40.00	54,854.	12,606.	0.
CATHERINE SITTON - 114 WEST 7TH STREET, SUITE 1200, AUSTIN, TX 78701	GRANT MANAGER 40.00	54,854.	12,606.	0.

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

▶ 0

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities	1a	56,065,386.
b	Average of monthly cash balances	1b	1,971,426.
c	Fair market value of all other assets	1c	604,083.
d	<b>Total</b> (add lines 1a, b, and c)	1d	58,640,895.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	58,640,895.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	879,613.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	57,761,282.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	2,888,064.

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

1	Minimum investment return from Part X, line 6	1	2,888,064.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	38,598.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	38,598.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,849,466.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,849,466.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,849,466.

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

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	3,774,097.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	3,774,097.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	38,598.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	3,735,499.

**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.

**CARL C ANDERSON AND MARIE JO ANDERSON  
CHARITABLE FOUNDATION**

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**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				2,849,466.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			988,086.	
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: ▶ \$ 3,774,097.				
a Applied to 2009, but not more than line 2a			988,086.	
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				2,786,011.
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				63,455.
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				

N/A

▶

☐ 4942(j)(3) or ☐ 4942(j)(5)

**(4) Gross investment income**

[illegible]

**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:**

C & M ANDERSON CHARITABLE FOUNDATION, 512-458-2285  
114 W. 7TH STREET, SUITE 1200, AUSTIN, TX 78701

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

**CONTACT THE FOUNDATION OFFICE FOR CURRENT APPLICATION INFORMATION.**

**c Any submission deadlines:**

CONTACT THE FOUNDATION OFFICE FOR CURRENT INFORMATION.

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

**CONTACT THE FOUNDATION OFFICE FOR CURRENT APPLICATION INFORMATION.**









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

SOURCE	AMOUNT
INTEREST INCOME - BANK OF AMERICA	6.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	6.

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDEND INCOME- BANK OF AMERICA	994,544.	0.	994,544.
INTEREST INCOME- BANK OF AMERICA	798,922.	0.	798,922.
TOTAL TO FM 990-PF, PART I, LN 4	1,793,466.	0.	1,793,466.

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
LEASE BONUS	52,500.	52,500.	
EXCISE TAX REFUND	1,836.	1,836.	
TOTAL TO FORM 990-PF, PART I, LINE 11	54,336.	54,336.	

## FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	376.	0.		376.
TO FM 990-PF, PG 1, LN 16A	376.	0.		376.



FORM 990-PF	ACCOUNTING FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TAX PREPARATION FEE	2,310.	0.		2,310.	
ACCOUNTING	12,650.	0.		12,650.	
PAYROLL FEES	1,700.	0.		1,700.	
TO FORM 990-PF, PG 1, LN 16B	16,660.	0.		16,660.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	31,916.	31,916.		0.	
FOREIGN TAXES ON QUALIFIED	6,524.	6,524.		0.	
FOREIGN TAXES ON					
NON-QUALIFIED	1,192.	1,192.		0.	
EMPLOYER FICA/MEDICARE	18,492.	0.		18,492.	
TRAVIS CO. PERSONAL					
PROPERTY	391.	0.		391.	
TO FORM 990-PF, PG 1, LN 18	58,515.	39,632.		18,883.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
WEBSITE CONTRACT/ MAINT.	1,457.	0.		1,457.	
OTHER MISC. EXPENSE	172.	0.		172.	
INSURANCE EXPENSE	8,999.	0.		8,999.	
OFFICE EXPENSE	11,159.	0.		11,159.	
ASSOCIATION MEMBERSHIP FEES	757.	0.		757.	
OTHER INVESTMENT FEES	6,750.	6,750.		0.	
SOFTWARE EXPENSE	3,456.	0.		3,456.	
ADVISORY FEES-INVESTMENT	348,890.	348,890.		0.	
TO FORM 990-PF, PG 1, LN 23	381,640.	355,640.		26,000.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
DESCRIPTION	AMOUNT		
NONDIVIDEND DISTRIBUTION	8,718.		
OTHER NONTAXABLE RECEIPTS	3,507.		
TIMING-FACTORED INCOME	69.		
YEAR END TRADES	23,180.		
OUTSTANDING EXPENSES CHECKS	13,096.		
TIMING NET COST BASIS ADJ.	3,017.		
ROUNDING	46.		
ACCRUED INTEREST PAID CARRYOVER	5,396.		
DEPRECIATION	3,274.		
TOTAL TO FORM 990-PF, PART III, LINE 3	60,303.		

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	9
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
U.S. GOVERNMENT SECURITIES	X		26,201,066.	31,040,532.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			26,201,066.	31,040,532.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS					
TOTAL TO FORM 990-PF, PART II, LINE 10A			26,201,066.	31,040,532.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	10
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE STOCK	12,898,111.	15,365,429.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	12,898,111.	15,365,429.	

FORM 990-PF	CORPORATE BONDS	STATEMENT 11
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	16,371,878.	16,945,670.
TOTAL TO FORM 990-PF, PART II, LINE 10C	16,371,878.	16,945,670.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	12
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
REAL ESTATE INVESTMENTS	COST	492,243.	553,454.
COMMODITIES	COST	44,588.	182,158.
FIXED INCOME MUTUAL FUNDS	COST	0.	0.
MINERAL INTERESTS	COST	1.	78,950.
TOTAL TO FORM 990-PF, PART II, LINE 13		536,832.	814,562.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT		STATEMENT 13
DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
BREAKROOM TABLE SE	317.	271.	46.
FILE CABINET	420.	350.	70.
FURNITURE & FIXTURES	5,684.	3,451.	2,233.
BIZ PHONE SYSTEM	2,093.	2,093.	0.
LANIER DIG LD122 C	5,092.	5,092.	0.
COMPUTER	4,738.	3,475.	1,263.
PRINTER	1,463.	1,268.	195.
COMPUTER	2,400.	1,560.	840.
OFFICE APPLIANCE	318.	175.	143.
COMPUTER	1,599.	880.	719.
TOTAL TO FM 990-PF, PART II, LN 14	24,124.	18,615.	5,509.

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FORM 990-PF                      PART VIII - LIST OF OFFICERS, DIRECTORS                      STATEMENT 14  
    TRUSTEES AND FOUNDATION MANAGERS

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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
BANK OF AMERICA, N.A. P.O. BOX 831041 DALLAS, TX 75283-1041	TRUSTEE 40.00	121,300.	0.	0.
JENNIFER J. BIRD 1016 LA POSADA DR. STE #142 AUSTIN, TX 78752	TRUSTEE/CHAIRMAN OF THE BOARD 30.00	65,000.	22,269.	0.
R. RUSSELL RAGER 6400 UPTOWN BLVD. #550 EAST ALBUQUERQUE, NM 87110	TRUSTEE 5.00	30,000.	0.	0.
CHARLES R. BATTE, III 1111 NORTH LOOP WEST #900 HOUSTON, TX 77008	TRUSTEE 5.00	15,000.	0.	0.
BRADFORD H. ROBB 114 W. 7TH ST. SUITE 1200 AUSTIN, TX 78701	EXECUTIVE DIRECTOR 40.00	107,917.	17,006.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		339,217.	39,275.	0.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 15

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
A NEW LEAF 2306 SOUTH 1ST PLACE BROKEN ARROW, OK 74012	COMMUNITY VOCATIONAL SALES TRAINING PROGRAM	NON PROFIT ORG	15,000.
ADELANTE DEVELOPMENT CENTER, INC. 3900 OSUNA ROAD NE ALBUQUERQUE, NM 87109	FRIENDS IN TIME AND BACK IN USE PROGRAMS	NON PROFIT ORG	40,000.
ALBUQUERQUE HEALTH CARE FOR THE HOMELESS, INC P.O. BOX 25445 ALBUQUERQUE, NM 87125	2010 GIFT CON NINOS PROGRAM AND RRR DISCRETIONARY	NON PROFIT ORG	15,000.
ALL SAINTS HEALTH FOUNDATION 1400 8TH AVE FORT WORTH, TX 76104	ISLET CELL TRANSPLANT RESEARCH (MATSUMOTO, LEVY)	NON PROFIT ORG	50,000.
ANY BABY CAN 1121 E. 7TH ST AUSTIN, TX 78702	2010 GIFT EARLY CHILDHOOD INTERVENTION PROGRAM	NON PROFIT ORG	25,000.
AUSTIN COMMUNITY FOUNDATION PO BOX 5159 AUSTIN, TX 78767	CHRISTMAS PROGRAM SEASON OF CARING	NON PROFIT ORG	1,500.
BATTERED WOMEN'S FOUNDATION P.O. BOX 54888 HURST, TX 76054	SUPPORT SERVICES FOR CHILDREN (FOOD, CLOTHING, TUTO	NON PROFIT ORG	10,000.
BAYLOR COLLEGE OF MEDICINE/TEXAS CHILDREN'S HOSPITAL 1919 S. BRAESWOOD MS4-4483 HOUSTON, TX 77030	IMMUNOTHERAPY OF RELAPSE NEUROBLASTOMA DR. YUSTEIN	NON PROFIT ORG	25,000.

BAYLOR COLLEGE OF MEDICINE/TEXAS CHILDREN'S HOSPITAL 1919 S. BRAESWOOD MS4-4483 HOUSTON, TX 77030	AML-OVERCOMING CHEMOTHERAPY RESISTANCE DR. LOUIS	NON PROFIT ORG	25,000.
BAYLOR COLLEGE OF MEDICINE/TEXAS CHILDREN'S HOSPITAL 1919 S. BRAESWOOD MS4-4483 HOUSTON, TX 77030	DEVELOPING A STRATEGY TO OVERCOME TUMOR PROTECTION BY THE CYTOKLINE TGFB	NON PROFIT ORG	27,500.
CANINE COMPANIONS FOR INDEPENDENCE 124 RANCHO DEL ORO DR. OCEANSIDE, CA 92052	TEAM SPONSORSHIP	NON PROFIT ORG	10,000.
CAPITAL AREA FOOD BANK 8201 S. CONGRESS AUSTIN, TX 78745	KID'S CAFE PROGRAM	NON PROFIT ORG	10,000.
CAPTAIN HOPE'S KIDS 10555 NEW KIRK, SUITE 580 DALLAS, TX 75220	2010 GIFT CAPTAIN HOPE'S CLOSET	NON PROFIT ORG	20,000.
CHILDREN'S MEDICAL CENTER FOUNDATION OF CENTRAL TX, DELL CHILDREN'S MEDICAL - 4900 MUELLER BLVD. AUSTIN, TX 78723	CCA/MJA OUTPATIENT REHABILITATION CENTER IN HONOR OF	FOUNDATION	500,000.
CHRIST'S HAVEN FOR CHILDREN PO BOX 467 KELLER, TX 76244	FOOD AND CLOTHING FOR CHILDREN	NON PROFIT ORG	25,000.
COMMUNITY PARTNERS OF DALLAS 1215 SKILES ST. DALLAS, TX 75204	KIDS IN CRISIS PROGRAM	NON PROFIT ORG	15,000.
DOWN HOME RANCH 20250 FM 619 ELGIN, TX 78621	2010 GIFT GENERAL OPERATIONS	NON PROFIT ORG	25,000.
EAST TEXAS FOOD BANK 3201 ROBERSTON RD. TYLER, TX 75701	2010 GIFT SENIOR SERVINGS PROGRAM	NON PROFIT ORG	20,000.

EASTERN OKLAHOMA DONATED DENTAL SERVICES 3741 SOUTH PEORIA TULSA, OK 74105	GENERAL OPERATIONS	NON PROFIT ORG	20,000.
FOR THE CHILDREN PO BOX 29346 AUSTIN, TX 78755	SCHOOL SUPPLIES FOR LOW INCOME FAMILIES	NON PROFIT ORG	1,500.
GETHSEMANE LUTHERAN CHURCH 200 W. ANDERSON LN AUSTIN, TX 78752	CHILDREN'S AND SENIOR ADULT MINISTRY PROGRAMS	NON PROFIT ORG	20,000.
GOOD SHEPHERD CENTER P.O. BOX 749 ALBUQUERQUE, NM 87103	2010 GIFT FOR GENERAL OPERATIONS	NON PROFIT ORG	40,000.
GRAND PRARIE WELLNESS CENTER 1710 SMALL ST GRAND PRAIRIE, TX 75050	CHILDREN'S PROGRAM (MEDICAL AND DENTAL)	NON PROFIT ORG	15,000.
HOPE CENTER OF EDMOND, INC. 1251 N. BROADWAY #A EDMOND, OK 73003	FOR BACK TO SCHOOL PROGRAM	NON PROFIT ORG	10,000.
HOUSTON AREA RESPITE CENTER 6856 BELLAIRE BLVD HOUSTON, TX 77074	2010 GIFT FOR GENERAL OPERATIONS FUNDING	NON PROFIT ORG	25,000.
INFANT CRISIS SERVICES, INC. 4224 N. LINCOLN BLVD OKLAHOMA CITY, OK 73105	2010 GIFT EMERGENCY SUPPLIES (BABIES, TODDLERS)	NON PROFIT ORG	25,000.
LABOR OF LOVE PO BOX 350 ATHENS, TX 75751	HOME REPAIRS FOR THE HANDICAPPED AND INDIGENT ELDERLY	NON PROFIT ORG	10,000.
LAUNCHABILITY 4350 SIGMA ROAD, SUITE 100 DALLAS, TX 75244	EARLY CHILDHOOD INTERVENTION PROGRAM FOR CHILDREN BIRTH-3 WITH DISABILITIES	NON PROFIT ORG	20,000.

MARBRIDGE 2310 BLISS SPILLAR RD. MANCHACA, TX 78652	GENERAL OPERATIONS	NON PROFIT ORG	20,000.
MEALS ON WHEELS AND MORE, AUSTIN 3227 E. 5TH STREET AUSTIN, TX 78702	GENERAL OPERATIONS FOR MEALS PROGRAMS.	NON PROFIT ORG	30,000.
MEALS ON WHEELS PLUS 717 NORTH 10TH STREET ABILENE, TX 79601	2010 GROCERIES ON WHEELS	NON PROFIT ORG	15,000.
NAVAJO MINISTRIES 2103 WEST MAIN ST FARMINGTON, NM 87499	2010 GIFT FOUR CORNERS FOR CHILDREN	NON PROFIT ORG	10,000.
NORTHWEST ASSISTANCE MINISTRIES 1555 KUYKENDAHL RD. HOUSTON, TX 77090	FUNDING FOR THE CHILDREN'S CLINIC FOR NAM	NON PROFIT ORG	20,000.
AUSTIN POLICE, OPERATION BLUE SANTA PO BOX 689001 AUSTIN, TX 78768	CHRISTMAS PROGRAM	NON PROFIT ORG	1,500.
READY START 1701 N. COLLINS BLVD, STE 100 RICHARDSON, TX 75080	EARLY CHILDHOOD INTERVENTION PROGRAM	NON PROFIT ORG	15,000.
RIDE ON CENTER FOR KIDS (ROCK) 2050 CR 110 GEORGETOWN, TX 78627	GENERAL OPERATIONS	NON PROFIT ORG	25,000.
RONALD MCDONALD HOUSE CHARITIES OF EL PASO 300 E CALIFORNIA AVE EL PASO, TX 79902	OPERATING COSTS FOR RONALD MCDONALD CARE MOBILE	NON PROFIT ORG	15,000.
STARRY, INC 1301 N. MAYS ST ROUND ROCK, TX 78664	2010 GIFT GENERAL OPERATIONS (EMERGENCY SHELTER)	NON PROFIT ORG	25,000.



SUNBEAM FAMILY SERVICES 616 NW 21ST ST OKLAHOMA CITY, OK 73103	CAREGIVER FUNDAMENTAL PROJECT/RESPITE PROGRAM	NON PROFIT ORG	10,000.
TEXAS BAPTIST CHILDREN'S HOME, INC 1301 N. MAYS ST ROUND ROCK, TX 78664	TUTORING FOR SHELTER CHILDREN WHO NEED EDUCATIONAL S	NON PROFIT ORG	15,000.
TEXAS RAMP PROJECT PO BOX 832065 RICHARDSON, TX 75083	2010 GIFT TX CHALLENGE GRANT/OK RAMP PROJECTS	NON PROFIT ORG	5,000.
THE ABILITY CENTER FOR INDEPENDENT LIVING 715 E. IDAHO AVE. STE. 3E LAS CRUCES, NM 87701	2010 GIFT PROJECT FOOD SECURITY	NON PROFIT ORG	12,000.
THE SALVATION ARMY - AUSTIN 501 E. 8TH STREET, PO BOX 1000 AUSTIN, TX 78767	CHRISTMAS PROGRAM	NON PROFIT ORG	1,500.
THE SALVATION ARMY, ALBUQUERQUE NM 700 LOMAS BLVD NE #108, 2 WOODLAND CENTER ALBUQUERQUE, NM	2010 GIFT FOR EMERGENCY ASSISTANCE (ELDERLY & FAMILIES WITH CHILDREN)	NON PROFIT ORG	30,000.
THE UNIVERSITY OF NEW MEXICO 1 UNIVERSITY OF NEW MEIXCO ALBUQUERQUE, NM 87131	CAPITAL CAMPAIGN	NON PROFIT ORG	600,000.
TOYS FOR TOTS 400 WYOMING BLVD. NE ALBUQUERQUE, NM 87123	CHRISTMAS PROGRAM	NON PROFIT ORG	1,500.
TOYS FOR TOTS OF OKLAHOMA CITY 5316 SOUTH DOUGLAS BLVD OKLAHOMA CITY, OK 73150	CHRISTMAS PROGRAM	NON PROFIT ORG	1,000.
TOYS FOR TOTS OF TULSA 1101 N 6TH STEET BROKEN ARROW, OK 74012	CHRISTMAS PROGRAM	NON PROFIT ORG	1,000.

UT SOUTHWESTERN MEDICAL SCHOOL AT DALLAS 5323 HARRY HINES BLVD DALLAS, TX 75390	"MOLECULAR SIGNATURES" OF HUMAN CANCER TO PROVIDE NEW METHOD FOR DIAGNOSIS	NON PROFIT ORG	25,000.
ALBUQUERQUE COMMUNITY FOUNDATION 3301 MENAUL BOULEVARD NE ALBUQUERQUE, NM 87107	SUMMER FOOD PROGRAM	FOUNDATION	50,000.
AUSTIN CHILDREN'S SHELTER 4800 MANOR ROAD AUSTIN, TX 78723	MEDICAL AND DENTAL SERVICES FOR CHILDREN	NON PROFIT ORG	45,000.
FAMILY ELDERCARE 221- HANCOCK DR. AUSTIN, TX 78756	2010 GIFT FOR BILL PAYER AND IN-HOME CARE PROGRAMS	NON PROFIT ORG	25,000.
LIFE SENIOR SERVICES 5950 E 31ST ST TULSA, OK 74135	ADULT DAY SERVICES	NON PROFIT ORG	25,000.
MEALS ON WHEELS AND MORE, AUSTIN 3227 E. 5TH STREET AUSTIN, TX 78702	GENERAL OPERATIONS	NON PROFIT ORG	30,000.
PEOPLE'S COMMUNITY CLINIC 2909 N IH 35 AUSTIN, TX 78722	2010 GIFT IMMUNIZATION AND PEDIATRIC WELL-CHILD PROGRAMS	NON PROFIT ORG	30,000.
RECORDING FOR THE BLIND AND DYSLEXIC 1314 W. 45TH ST. AUSTIN, TX 78746	EXPANSION OF PROGRAMS INTO NEW MEXICO	NON PROFIT ORG	18,850.
RONALD MCDONALD HOUSE CHARITIES OF NM 1011 YALE BLVD, NE ALBUQUERQUE, NM 87106	2010 GIFT FUNDING TO HELP LOW INCOME FAMILIES WITH OVERNIGHT COSTS	NON PROFIT ORG	10,000.
SHRINERS HOSPITALS FOR CHILDREN-GALVESTON 815 MARKET ST GALVESTON, TX 77550	DRS. HERNDON/JESCHKE REPLACEMENT SKIN PROJECT	NON PROFIT ORG	75,000.

SPIRITHORSE THERAPEUTIC RIDING CENTER 1960 POST OAK CORINTH, TX 76210	CONTINUATION & EXPANSION OF THERAPEUTIC HORSEBACK RIDING PROGRAM	NON PROFIT ORG	20,000.
ST. JUDE CHILDREN'S RESEARCH HOSPITAL 501 ST. JUDE PLACE MEMPHIS, TN 38015	2010 GIFT FOR THE NEUROBIOLOGY AND BRAIN TUMOR PROGRAM	NON PROFIT ORG	100,000.
TEXAS CHILDREN'S HOSPITAL (BAYLOR) 1919 S. BRAESWOOD MC4-4483 HOUSTON, TX 77030	RAPAMYCIN: CHILDHOOD EPILEPSY THERAPY & RHETT SYNDROME PROJECT (SWANN)	NON PROFIT ORG	50,000.
THERAPY PET PALS OF TEXAS, INC. 3930 BEE CAVE RD. STE. C AUSTIN, TX 78746	GENERAL OPERATIONS TO SUPPORT PET THERAPY IN HEALTH	NON PROFIT ORG	5,000.
SHARE YOUR CARE 2601 WYOMING BLVD ALBUQUERQUE, NM 87112	GENERAL OPERATIONS	NON PROFIT ORG	20,000.
HUMBLE AREA ASSISTANCE MINISTRY PO BOX 14051 HUMBLE, TX 77347	BASIC NEEDS PROGRAMS FOR CHILDREN	NON PROFIT ORG	10,000.
SAFEPLACE PO BOX 19454 AUSTIN, TX 78760	SERVICES FOR CHILDREN	NON PROFIT ORG	10,000.
AMERICAN RED CROSS DALLAS CHAPTER 4800 HARRY HINES BLVD DALLAS, TX 75235	FOR LIFELINE PROGRAM	NON PROFIT ORG	15,000.
ARCA 11300 LOMAS NE ALBUQUERQUE, NM 87112	FOR FAMILY LIVING SERVICES PROGRAM	NON PROFIT ORG	10,000.
DOWN SYNDROME ASSOCIATION OF CENTRAL TEXAS 3710 CEDAR STREET BOX 3 AUSTIN, TX 78705	FOR THE LEARNING PROGRAM	NON PROFIT ORG	15,000.

VIETNAM VETERANS OF AMERICA #968 2114 WEST SECOND STREET ROSWELL, NM 88201	FOR TRANSPORTATION OPERATIONS	NON PROFIT ORG	5,000.
ANGELHEART CHILDREN'S SHELTER 15401 CAMERON ROAD PFLUGERVILLE, TX 78660	FOR PURCHASE OF USED VAN FOR SHELTER TRANSPORTATION	NON PROFIT ORG	15,000.
ALS ASSOCIATION OF NORTH TEXAS 1231 GREENWAY DRIVE SUITE 270 IRVING, TX 75038	FOR NUTRITION AND EQUIPMENT LOAN BANK	NON PROFIT ORG	20,000.
VIETNAM VETERANS OF AMERICA #968 15 YARD ROAD PENNINGTON, NJ 08534	FOR GENERAL OPERATIONS	NON PROFIT ORG	15,000.
HEALING HANDS MINISTRIES PO BOX 741524 DALLAS, TX 75374	FOR MEDICAL AND DENTAL SERVICES FOR CHILDREN	NON PROFIT ORG	10,000.
BRAZORIA COUNTY ASSOCIATION FOR CITIZENS WITH HANDICAPS 120 E. HOSPITAL DRIVE ANGLETON, TX 77515	FOR GENERAL OPERATIONS	NON PROFIT ORG	10,000.
JUNIOR LEAGUE OF AUSTIN 5416 PARKCREST SUITE 100 AUSTIN, TX 78731	FOR F.I.T. PROGRAM	NON PROFIT ORG	20,000.
SPECIAL CARE INC. 12201 N. WESTERN AVE. OKLAHOMA CITY, OK 73114	FOR SCHOLARSHIP SUPPORT	NON PROFIT ORG	20,000.
MARY LEE FOUNDATION 1339 LAMAR SQUARE DRIVE AUSTIN, TX 78704	FOR HOME AND COMMUNITY SERVICE SUPPORT	FOUNDATION	10,000.
ARCA 11300 LOMAS NE ALBUQUERQUE, NM 87112	2010 GIFT FOR HEALTH AND WELLNESS PROGRAM AND ARCA ORGANICS	NON PROFIT ORG	10,000.

BO'S PLACE 10050 BUFFALO SPEEDWAY HOUSTON, TX 77054	2010 GIFT FOR GENERAL OPERATIONS	NON PROFIT ORG	20,000.
UT DEPARTMENT BIOMEDICAL ENGINEERING 107 W. DEAN KEETON STREET AUSTIN, TX 78712	NEURAL STEM CELL MODULATION BY HYALURONIC ACID HYDROGELS DR. SCHMIDT	NON PROFIT ORG	50,000.
UT SOUTHWESTERN MEDICAL SCHOOL AT DALLAS 5323 HARRY HINES BLVD DALLAS, TX 75390	PHOSPHATIDYLSERINE AS A TARGET FOR CANCER THERAPY DR. THORPE	NON PROFIT ORG	25,000.
MEMORIAL HERMANN FOUNDATION 929 GESSNER, SUITE 2650 HOUSTON, TX 77024	FOR DR. SLAWIN	FOUNDATION	50,000.
TEXAS CHILDREN'S HOSPITAL (BAYLOR) 1919 S. BRAESWOOD MC4-4483 HOUSTON, TX 77070	FOR RHETT SYNDROME RESEARCH MOUSE MODEL ZOGHBI	NON PROFIT ORG	50,000.
UNM SCHOOL OF MEDICINE 1 UNIVERSITY OF NEW MEXICO ALBUQUERQUE, NM 87131	2010 GIFT FOR THE YES CLINIC DR. HEIDEMAN CONTINUATION	NON PROFIT ORG	50,000.
UNM SCHOOL OF MEDICINE 1 UNIVERSITY OF NEW MEXICO ALBUQUERQUE, NM 87102	2010 GIFT FOR PEDIATRIC THROMBOPHILIA REGISTRY DR. MATHEW	NON PROFIT ORG	50,000.
TRAVIS COUNTY SHERIFF'S OFFICE PO BOX 207 AUSTIN, TX 78767	CHRISTMAS PROGRAM	NON PROFIT ORG	1,500.
ALBUQUERQUE CHRISTIAN CHILDREN'S HOME 5700 WINTER HAVEN ROAD NW ALBUQUERQUE, NM 87120	GENERAL OPERATIONS	NON PROFIT ORG	25,000.
RIDE ON CENTER FOR KIDS (ROCK) P.O. BOX 2422 GEORGETOWN, TX 78627	EQUIPMENT TO ADVANCE RESEARCH COMPONENT	NON PROFIT ORG	10,000.

ASSOCIATION FOR INDEPENDENT LIVING 2826 STOREY LANE DALLAS, TX 75220	AFIL WAY PROGRAM	NON PROFIT ORG	15,000.
THE BROOKWOOD COMMUNITY 1752 FM 1489 BROOKSHIRE, TX 77423	CERAMICS EXPANSION	NON PROFIT ORG	20,000.
CASA ANGELICA 5629 ISLETA BLVD SW ALBUQUERQUE, NM 87105	GENERAL OPERATIONS	NON PROFIT ORG	25,000.
OKLAHOMA FOUNDATION FOR THE DISABLED 8421 N. WALKER AVE. OKLAHOMA CITY, OK 73114	210 GIFT CLIENT SCHOLARSHIPS AND TRANSPORTATION	FOUNDATION	20,000.
MEALS FOR THE ELDERLY 310 E. HOUSTON HARTE SAN ANGELO, TX 76903	2010 GIFT FOR GENERAL OPERATIONS	NON PROFIT ORG	15,000.
PARKER COUNTY COMMITTEE ON AGING 1205 HOLLAND LAKE DRIVE WEATHERFORD, TX 76086	2010 GIFT FOR MEALS ON WHEELS PROGRAM	NON PROFIT ORG	10,000.
HELPING HAND HOME FOR CHILDREN 3804 AVENUE B AUSTIN, TX 78751	2010 GIFT GENERAL OPERATIONS	NON PROFIT ORG	10,000.
ST. JUDE RANCH FOR CHILDREN 1400 RIDGE CREEK LANE BULVERDE, TX 78163	2010 GIFT FOR GENERAL OPERATIONS	NON PROFIT ORG	15,000.
THE SALVATION ARMY PO BOX 36607 DALLAS, TX 75235	2010 GIFT KIDS CARE CONNECTION	NON PROFIT ORG	25,000.
REINS FOR LIFE 370 1/2 CADDO ROAD DEXTER , NM 88230	2010 GIFT FOR GENERAL OPERATIONS	NON PROFIT ORG	5,000.

BOYS AND GIRLS CLUB OF AUSTIN 5407 NORTH IH-35 SUITE 400 AUSTIN, TX 78723	2010 GIFT FOR CHRISTMAS SHOE PROGRAM	NON PROFIT ORG	5,000.
LIFENET 9708 SKILLMAN STREET DALLAS, TX 75243	FUNDING FOR TRANSITIONAL REQUIREMENTS DUE TO STATE/FEDERAL FUNDING	NON PROFIT ORG	3,500.
CHILDREN'S MEDICAL CENTER FOUNDATION 4900 MUELLER BLVD. AUSTIN, TX 78723	SURGICAL MICROSCOPE FOR CRANIO FACIAL	FOUNDATION	25,000.
JEWISH FAMILY SERVICES 5520 WYOMING BOULEVARD, STE 200 ALBUQUERQUE, NM 87109	AGING WELL AT HOME PROGRAM	NON PROFIT ORG	10,000.
PHILADELPHIA MINISTRIES 201 DALLAS STREET NE ALBUQUERQUE, NM 87108	FOOD PROGRAM FOR SHUT-INS	NON PROFIT ORG	5,000.
FEDERAL EMPLOYEES EDUCATION 3333 S. WADSWORTH BLVD. SUITE 300 LAKEWOOD , CO 80227	VERNON HUNTER SCHOLARSHIP FUND	NON PROFIT ORG	2,000.
SAN ANTONIO LIGHTHOUSE FOR THE BLIND 2305 ROOSEVELT AVE. SAN ANTONIO, TX 78210	SCHOOL TO WORK PROGRAM	NON PROFIT ORG	10,000.
MEALS ON WHEELS OF METRO TULSA 12620 E. 31ST STREET TULSA, OK 74146	GENERAL OPERATIONS	NON PROFIT ORG	20,000.
REGIONAL FOOD BANK OF OKLAHOMA 3355 S. PURDUE STREET OKLAHOMA CITY, OK 73137	FOOD 4 KIDS	NON PROFIT ORG	10,000.
JUNIOR LEAGUE OF AUSTIN 416 PARKCREST SUITE 100 AUSTIN, TX 78731	FOOD IN TUMMIES PROGRAM	NON PROFIT ORG	15,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			3,219,850.

Form **4562**Department of the Treasury  
Internal Revenue Service (99)

Name(s) shown on return

**Depreciation and Amortization 990-PF**  
(Including Information on Listed Property)

▶ See separate instructions.

▶ Attach to your tax return.

OMB No 1545-0172

**2010**Attachment  
Sequence No **67****CARL C ANDERSON AND MARIE JO ANDERSON  
CHARITABLE FOUNDATION**

Business or activity to which this form relates

Identifying number

**FORM 990-PF PAGE 1****74-6078530****Part I Election To Expense Certain Property Under Section 179** Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	500,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	2,000,000.
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2009 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2011. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V

**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	959.
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

**Part III MACRS Depreciation (Do not include listed property.) (See instructions)****Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2010	17	2,219.
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

**Section B - Assets Placed in Service During 2010 Tax Year Using the General Depreciation System**

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property		958.	5 YRS.	HY	SL	96.
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property	/		27 5 yrs.	MM	S/L	
	/		27 5 yrs	MM	S/L	
i Nonresidential real property	/		39 yrs	MM	S/L	
	/			MM	S/L	

**Section C - Assets Placed in Service During 2010 Tax Year Using the Alternative Depreciation System**

20a Class life				S/L	
b 12-year			12 yrs.	S/L	
c 40-year	/		40 yrs.	MM	S/L

**Part IV Summary (See instructions.)**

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr.	22	3,274.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	



**CARL C ANDERSON AND MARIE JO ANDERSON**  
**CHARITABLE FOUNDATION**

Form 4562 (2010)

74-6078530 Page 2

**Part V** **Listed Property** (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement)

**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

**Section A - Depreciation and Other Information** (Caution: See the instructions for limits for passenger automobiles.)

**24a** Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No **24b** If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
--	-------------------------------------	--	-------------------------------	--	---------------------------	------------------------------	----------------------------------	---------------------------------------

**25** Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use **25**

**26** Property used more than 50% in a qualified business use.

		%						
		%						
		%						

**27** Property used 50% or less in a qualified business use.

		%			S/L -			
		%			S/L -			
		%			S/L -			

**28** Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1 **28**

**29** Add amounts in column (i), line 26. Enter here and on line 7, page 1 **29**

**Section B - Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person.

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle		(b) Vehicle		(c) Vehicle		(d) Vehicle		(e) Vehicle		(f) Vehicle	
<b>30</b> Total business/investment miles driven during the year (do not include commuting miles)												
<b>31</b> Total commuting miles driven during the year												
<b>32</b> Total other personal (noncommuting) miles driven												
<b>33</b> Total miles driven during the year. Add lines 30 through 32												
<b>34</b> Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
<b>35</b> Was the vehicle used primarily by a more than 5% owner or related person?												
<b>36</b> Is another vehicle available for personal use?												

**Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees**

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

<b>37</b> Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	<b>Yes</b>	<b>No</b>
<b>38</b> Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners.		
<b>39</b> Do you treat all use of vehicles by employees as personal use?		
<b>40</b> Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
<b>41</b> Do you meet the requirements concerning qualified automobile demonstration use?		

**Note:** If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.

**Part VI** **Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
-----------------------------	------------------------------------	------------------------------	------------------------	---	--------------------------------------

**42** Amortization of costs that begins during your 2010 tax year:


**43** Amortization of costs that began before your 2010 tax year **43**

**44** **Total.** Add amounts in column (f). See the instructions for where to report **44**

FROM 01/01/2010  
TO 12/31/2010

BANK OF AMERICA, NA  
STATEMENT OF CAPITAL GAINS AND LOSSES  
CARL C ANDERSON SR & MARIE JO ANDERSON  
CHARITABLE FOUNDATION  
TRUST YEAR ENDING 12/31/2010

PAGE 1541

RUN 10/24/2011  
03.00:35 PM

TAX PREPARER: 811  
TRUST ADMINISTRATOR: 345  
INVESTMENT OFFICER: 92

LEGEND: F - FEDERAL S - STATE I - INHERITED  
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
----------------------	--------	------	-------------	------------	-----------	------

SUMMARY OF CAPITAL GAINS/LOSSES

FEDERAL	SHORT TERM	LONG TERM 28%	LONG TERM 15%	ST WASH SALE	LT WASH SALE	1250 GAIN
SUBTOTAL FROM ABOVE	1465361.64	0 00	985800 83	0 00	0.00	0.00*
COMMON TRUST FUND	0 00	0.00	0 00			0 00
CAPITAL GAIN DIVIDENDS	0 00	0.00	28402 19			460 07
	1465361.64	0 00	1014203 02	0.00	0.00	460 07
=====	=====	=====	=====	=====	=====	=====
STATE						
SUBTOTAL FROM ABOVE	1465361 64	0 00	985800 83	0 00	0.00	0 00*
COMMON TRUST FUND	0.00	0 00	0.00			0 00
CAPITAL GAIN DIVIDENDS	0.00	0.00	28402 19			460 07
	1465361 64	0 00	1014203.02	0 00	0 00	460 07
=====	=====	=====	=====	=====	=====	=====

\* - 1250 GAIN DETAILED ON TRANS PAGES, NOT ABOVE

CAPITAL LOSS CARRYOVER

FEDERAL	0.00	0.00
TEXAS	N/A	N/A

**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 ☒ **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](http://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.*

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of exempt organization	CARL C ANDERSON SR & MARIE JO	Employer identification number
	ANDERSON CHARITABLE FOUNDATION		74-6078530
	Number, street, and room or suite no. If a P.O. box, see instructions.		
	BANK OF AMERICA, N.A. P.O. BOX 831041		
City, town or post office, state, and ZIP code. For a foreign address, see instructions			
DALLAS, TX 75283-1041			

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

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 ► BANK OF AMERICA, NA

Telephone No. ► (800) 357-7094FAX No. ► 214-209-2289

- 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 2010 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

<b>3a</b> 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.	<b>3a</b> \$	49,230.
<b>b</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.	<b>3b</b> \$	39,230.
<b>c Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b> \$	10,000.

**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.

Form **8868** (Rev. 1-2011)

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

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

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

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

<b>Type or print</b> File by the extended due date for filing your return. See instructions.	Name of exempt organization	CARL C ANDERSON SR & MARIE JO	Employer identification number	74-6078530
	ANDERSON CHARITABLE FOUNDATION			
	Number, street, and room or suite no. If a P.O. box, see instructions.			
	BANK OF AMERICA, N.A. P.O. BOX 831041			
City, town or post office, state, and ZIP code. For a foreign address, see instructions.				
DALLAS, TX 75283-1041				

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

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

- The books are in the care of ☒ **BANK OF AMERICA, NA, TRUSTEE**  
Telephone No. ☒ (800) 357-7094 FAX No. ☒ 214-209-2289
- 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.

- I request an additional 3-month extension of time until 11/15, 2011
- For calendar year 2010, or other tax year beginning       , 20       , and ending       , 20
- If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period
- State in detail why you need the extension ADDITIONAL TIME IS REQUESTED TO FILE A COMPLETE & ACCURATE TAX RETURN

<b>8a</b> 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.	<b>8a</b> \$	49,230.
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	<b>8b</b> \$	49,230.
<b>c</b> <b>Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>8c</b> \$	

**Signature and Verification**

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

Signature ☒ Mary Trust Title ☒ TRUSTEE Date ☒ 07/25/2011

Form 8868 (Rev 1-2011)