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: LOUIS H. AND MARY PATRICIA STUMBERG FOUNDATION

A Employer identification number: 74-6367261

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

Room/suite:

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 ▶ ☐

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

E If private foundation status was terminated under section 507(b)(1)(A) check here ▶ ☐

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶ $ 6,378,935.

J Accounting method: [X] Cash ☐ Accrual ☐ Other (specify) *(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 ▶ ☐

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)	27,422.			
	2 Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	93,341.	93,341.		ATCH 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	250,081.			
	b Gross sales price for all assets on line 6a 2,567,761.				
	7 Capital gain net income (from Part IV, line 2)		250,081.		
	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)	847.	847.		ATCH 2
	12 **Total.** Add lines 1 through 11	371,691.	344,269.		
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 3	5,300.	2,650.	0.	2,650.
	c Other professional fees (attach schedule) *	24,300.	22,617.	0.	1,683.
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) **	4,568.	568.	0.	0.
	19 Depreciation (attach schedule) and depletion	1,118.	1,118.	0.	
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 6	85.	85.	0.	0.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	35,371.	27,038.	0.	4,333.
	25 Contributions, gifts, grants paid	236,111.			236,111.
	26 **Total expenses and disbursements.** Add lines 24 and 25	271,482.	27,038.	0.	240,444.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	100,209.			
	b **Net investment income** (if negative, enter -0-)		317,231.		
	c **Adjusted net income** (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see page 30 of the instructions. *ATCH 4 JSA **ATCH 5 Form **990-PF** (2010)

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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	46,621.	35,510.	35,510.
	2	Savings and temporary cash investments	255,075.	192,400.	192,400.
	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) **	148,207.	0.	0.
	b	Investments - corporate stock (attach schedule) ATCH 8	3,643,785.	3,966,072.	6,037,783.
	c	Investments - corporate bonds (attach schedule) ATCH 9	100,380.	100,295.	113,242.
	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)	4,194,068.	4,294,277.	6,378,935.
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	4,194,068.	4,294,277.	
	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)	4,194,068.	4,294,277.	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	4,194,068.	4,294,277.	

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	4,194,068.
2	Enter amount from Part I, line 27a	2	100,209.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	4,294,277.
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	4,294,277.

**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** 250,081.

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	513,333.	4,483,424.	0.114496
2008	889,656.	5,620,584.	0.158285
2007	198,990.	6,156,800.	0.032320
2006	282,805.	5,162,177.	0.054784
2005	288,174.	4,812,881.	0.059876

2	**Total** of line 1, column (d)	2	0.419761
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	0.083952
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	5,495,747.
5	Multiply line 4 by line 3	5	461,379.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3,172.
7	Add lines 5 and 6	7	464,551.
8	Enter qualifying distributions from Part XII, line 4	8	240,444.

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	6,345.
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	6,345.
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	6,345.
6	Credits/Payments			
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a 5,488.		
b	Exempt foreign organizations-tax withheld at source	6b 0.		
c	Tax paid with application for extension of time to file (Form 8868)	6c 0.		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments Add lines 6a through 6d		7	5,488.
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	857.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	
11	Enter the amount of line 10 to be: **Credited to 2011 estimated tax** ▶ 0. **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

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? ☐ 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)*

		Yes	No
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 10		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 NONE	
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 NOT APPLICABLE	
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	5,304,794.
b	Average of monthly cash balances	1b	274,645.
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	5,579,439.
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	5,579,439.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	83,692.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	5,495,747.
6	**Minimum investment return.** Enter 5% of line 5	6	274,787.

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	274,787.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	6,345.		
b	Income tax for 2010 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	6,345.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	268,442.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	268,442.
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	268,442.

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	240,444.
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	240,444.
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	N/A
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	240,444.

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				268,442.
2	Undistributed income, if any, as of the end of 2010				
a	Enter amount for 2009 only				
b	Total for prior years 20 08 ,20 07 ,20 06				
3	Excess distributions carryover, if any, to 2010				
a	From 2005 ... 0.				
b	From 2006 ... 0.				
c	From 2007 ... 0.				
d	From 2008 ... 443,158.				
e	From 2009 ... 292,134.				
f	**Total** of lines 3a through e	735,292.			
4	Qualifying distributions for 2010 from Part XII, line 4 ▶ $ 240,444.				
a	Applied to 2009, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d	Applied to 2010 distributable amount				240,444.
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).)*	27,998.			27,998.
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	707,294.			
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				
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	707,294.			
10	Analysis of line 9				
a	Excess from 2006 ...				
b	Excess from 2007 ...				
c	Excess from 2008 ... 415,160.				
d	Excess from 2009 ... 292,134.				
e	Excess from 2010 ...				

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))

ATTACHMENT 11

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 12

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

ATTACHMENT 13

c Any submission deadlines

APPLICATIONS SHOULD BE SUBMITTED BY DECEMBER

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

NO RESTRICTIONS OR LIMITATIONS ON AWARDS.

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 14				
Total ▶ 3a				236,111.
b *Approved for future payment*				
Total ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	93,341.	
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	847.	
8 Gain or (loss) from sales of assets other than inventory			18	250,081.	
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)				344,269.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 344,269.

(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)

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

Diana M. Strumberg | 08-04-11 | Trustee

Signature of officer or trustee | Date | Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
STEWART GOODSON	Stewart Goodson CPA	3 Aug 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

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Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**

OMB No 1545-0047

2010

Name of the organization	**Employer identification number**
LOUIS H. AND MARY PATRICIA STUMBERG FOUNDATION	74-6367261

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not aggregate to more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year . . . . ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization LOUIS H. AND MARY PATRICIA STUMBERG FOUNDATION

Employer identification number 74-6367261

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	LOUIS AND MARY PAT STUMBERG 227 W. OLMOS DRIVE SAN ANTONIO, TX 78212	$ 180,419.	Person [X] Payroll [ ] Noncash [X] (Complete Part II if there is a noncash contribution)
2	LOUIS AND MARY PAT STUMBERG 227 W. OLMOS DRIVE SAN ANTONIO, TX 78212	$ 72,340.	Person [X] Payroll [ ] Noncash [X] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)

Name of organization LOUIS H. AND MARY PATRICIA STUMBERG FOUNDATION

Employer identification number 74-6367261

Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	DONATED 15,251 SHARES OF LIVE NATION ENTERTAINMENT, INC. STOCK. BASIS = $20,252 FMV = $180,419	$ 180,419.	02/19/2010
2	DONATED 2,000 SHS OF TRACTOR SUPPLY CO BASIS = $7,170 FMV = $72,340	$ 72,340.	09/03/2010
		$	
		$	
		$	
		$	

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

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

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

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

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

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

Type or print

File by the due date for filing your return See instructions

Name of exempt organization: LOUIS H. AND MARY PATRICIA STUMBERG FOUNDATION

Employer identification number: 74-6367261

Number, street, and room or suite no If a P O box, see instructions: TOWER LIFE BUILDING, SUITE 701

City, town or post office, state, and ZIP code For a foreign address, see instructions: SAN ANTONIO, TX 78205

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 ▶ 210 225-0243 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

▶ [X] 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**	$ 3,172.
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**	$ 5,488.
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**	$ 0.

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

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
DIVIDENDS AND INTEREST	93,341.	93,341.
TOTAL	93,341.	93,341.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
ROYALTY INCOME		818.	818.
MISCELLANEOUS REVENUE		29.	29.
	TOTALS	847.	847.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ERNST AND YOUNG, LLP	5,300.	2,650.	0.	2,650.
TOTALS	5,300.	2,650.	0.	2,650.

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	16,830.	15,147.	0.	1,683.
INVESTMENT MANAGEMENT FEES	7,470.	7,470.	0.	0.
TOTALS	24,300.	22,617.	0.	1,683.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
FOREIGN TAXES PAID	568.	568.	0.	0.
ESTIMATED TAX PAYMENTS	4,000.	0.	0.	0.
TOTALS	4,568.	568.	0.	0.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
AMORTIZATION	85.	85.	0.	0.
TOTALS	85.	85.	0.	0.

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

ATTACHMENT 7

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
US TREASURY NOTES	0.	0.
US OBLIGATIONS TOTAL	0.	0.

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
VARIOUS CORPORATE STOCKS	3,199,934.	4,133,417.
MUTUAL FUNDS	758,281.	1,899,587.
SAN JUAN BASIN ROY TRUST	14,115.	11,037.
LESS: ACCUM. DEPLETION	-6,258.	-6,258.
TOTALS	3,966,072.	6,037,783.

ATTACHMENT 9

FORM 990PF, PART II - CORPORATE BONDS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
HEWLETT PACKARD CO BONDS	100,295.	113,242.
TOTALS	100,295.	113,242.

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

ATTACHMENT 10

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.
MARY PAT STUMBERG 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.
DIANA M. STUMBERG 227 W. OLMOS DRIVE SAN ANTONIO, TX 78212	TRUSTEE 1.00	0.	0.	0.
ERIC B. STUMBERG 227 W. OLMOS DRIVE SAN ANTONIO, TX 78212	TRUSTEE 1.00	0.	0.	0.
	GRAND TOTALS	0.	0.	0.

FORM 990PF, PART XV - INFORMATION REGARDING FOUNDATION MANAGERS

L.H. & M. P. STUMBERG, 227 W. OLMOS DRIVE, SAN ANTONIO, TX 78212
ERIC B. STUMBERG, 106 EAST 6TH STREET, STE. 900, AUSTIN, TEXAS 78701

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

DIANA M. STUMBERG
227 W. OLMOS DRIVE
SAN ANTONIO, TX 78212
210-271-0448

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

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

STUMBERG FOUNDATION

2010 CONTRIBUTIONS

NAME AND ADDRESS	AMOUNT	PURPOSE
Amedd Museum P O Box 340244 Fort Sam Houston, San Antonio, TX 78234	5,000 00	CHARITABLE
Big Brothers Big Sisters of Central Texas 1400 Tillery St Austin, TX 78721	5,000 00	CHARITABLE
Boy Scouts of America Alamo Area 2226 NW Militiary San Antonio, TX 78213-1894	55,000 00	CHARITABLE
First Presbyterian Church 404 North Alamo San Antonio, TX 78205	120,000 00	RELIGIOUS
Haven for Hope of Bexar County 1 Haven for Hope Way San Antonio, TX 78207	12,829 82	CHARITABLE
Marine Toys for Tots Foundation 18251 Quantico Gateway Drive Triangle, VA 22172	50.00	CHARITABLE
NRA Freedom Action Foundation 11250 Waples Mill Road Fairfax, VA 22030	25,000 00	CHARITABLE
Optimist International 4494 Lindell Boulevard St Louis, MO 63108	36.00	CHARITABLE
Reformed Theological Seminary 5422 Clinton Blvd Jackson, MS 39209-3099	200 00	RELIGIOUS
Sam Ministries 5254 Blanco Rd. San Anttonio, TX 78216-7017	120 00	CHARITABLE
Shikar Safari Club Intl 3000 N Woodridge Rd Birmingham, AL 35223	12,200 00	CHARITABLE
The American Air Museum Cambridge CB22 4QR United Kingdom	100 00	CHARITABLE
The Heritage Foundation 214 Massachusetts Avenue NE Washington, DC 20002-4999	50 00	CHARITABLE
The Vietnam Veterans Memorial Fund 2600 Virginia Avenue, NW, Suite 104 Washinton, D C 20037	25 00	CHARITABLE
University of Texas Alicia Romo Scholarship Fund One UTSA Circle San Antonio, TX 78249	250 00	CHARITABLE
Uvalde Memorial Hospital Fund - The Kate Marmion Regional Medical Cancer Center 1025 Garner Field Road Uvalde, TX 78801	250 00	CHARITABLE
TOTAL	236,110 82	

Louis H and Mary Patricia Stumberg Foundation EIN 74-6367261
Form 990-PF, Part I, Line 19

	Units	Original Basis	Depletion Allowed or Allowable in PY	Original Basis Less Depl Allowed or Allowable in PY	Cost Depletion Factor	Cost Depletion
San Juan Royalty Trust	433	$12,579 00	$4,717 23	$7,862	0 124548	$979
San Juan Royalty Trust	36	$1,536 05	$422 71	$1,113	0 124548	$139
TOTALS		$14,115 05	$5,139 94	$8,975		$1,118

LOUIS H AND MARY PATRICIA STUMBERG 74-6367261

Schedule D Detail of Short-term Capital Gains and Losses

ATTACHMENT 1

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 - SEE ATTACHED	VARIOUS	VARIOUS	830,972	820,309	10,663
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			830,972	820,309	10,663
Totals			830,972	820,309	10,663

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LOUIS H AND MARY PATRICIA STUMBERG 74-6367261 74-6367261

ATTACHMENT 2

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 - SEE ATTACHED	VARIOUS	VARIOUS	1,729,775	1,497,738	232,037
LTCG DISTRIBUTION THRU FROST 571700	VARIOUS	VARIOUS	7,014		7,014
BASIS ADJUSTMENT FOR SALE OF LUKOIL OIL CO (THRU FROST)	12/31/1987	09/07/2010		1,426	-1,426
BASIS ADJUSTMENT FOR SALE OF US TREASURY NOTES (THRU FROST)	05/23/2007	VARIOUS		-1,793	1,793
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			1,736,789	1,497,371	239,418
			1,736,789		
Totals				1,497,371	239,418

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2010 Tax Information Statement

Account Number: F0571700
Recipient's Tax ID Number: 74-6367261
Payer's Federal ID Number: 74-6036463

☐ **Corrected** ☐ **2nd TIN notice**

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

Recipient's Name and Address:
LOUIS & MARY STUMBERG FOUNDATION
C/O ERNST & YOUNG
FROST BANK TOWER
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								
200 0000	032511107	ANADARKO PETROLEUM CORP COM	07/07/2010	09/16/2010	10,769.81	8,117.34	2,652.47	0.00
500.0000	071813109	BAXTER INTERNATIONAL INC COM *	VARIOUS	10/15/2010	24,576.08	25,028.61	-452.53	0 00
350.0000	088606108	BHP BILLITON LTD-SPON ADR*	12/23/2009	02/05/2010	23,323.70	26,170.94	-2,847.24	0.00
300.0000	088606108	BHP BILLITON LTD-SPON ADR*	12/23/2009	12/20/2010	26,750.57	22,432.23	4,318.34	0.00
250 0000	099724106	BORGWARNER INC COM*	05/11/2010	10/14/2010	13,395.52	10,025.14	3,370.38	0.00
250 0000	099724106	BORGWARNER INC COM*	05/11/2010	12/02/2010	16,317.97	10,025.14	6,292.83	0.00
300 0000	099724106	BORGWARNER INC COM*	05/11/2010	12/27/2010	21,680.66	12,030.17	9,650.49	0 00
708.0000	16945R104	CHINA UNICOM (HONG KONG) LTD ADR	VARIOUS	02/03/2010	7,987.43	9,756.87	-1,769.46	0.00
74.0000	17275R102	CISCO SYSTEM INC COM*	10/15/2009	09/16/2010	1,617.88	1,798.16	-180.28	0.00
685.0000	218868107	CORINTHIAN COLLEGES INC COM	02/09/2010	06/03/2010	8,770.05	9,166 33	-396 28	0.00
.9380	247916208	DENBURY RESOURCES INC (HOLDING COMP)	03/12/2010	03/29/2010	14.34	14.38	-0.04	0.00
75.0000	29364G103	ENTERGY CORP NEW COM	12/11/2009	10/06/2010	5,749.08	6,176.98	-427.90	0 00
207.0000	26884L109	EQT CORPORATION COM	09/08/2009	05/17/2010	8,487.54	8,477.31	10.23	0.00
850.0000	H27178104	FOSTER WHEELER AG*	06/03/2010	10/20/2010	20,555.90	21,120.63	-564.73	0.00
90.0000	369550108	GENERAL DYNAMICS CORP COM*	12/11/2009	08/12/2010	5,460.31	6,173.98	-713.67	0.00

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2010 Tax Information Statement

Account Number: F0571700
Recipient's Tax ID Number: 74-6367261
Payer's Federal ID Number: 74-6036463

☐ Corrected ☐ 2nd TIN notice

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

Recipient's Name and Address:
LOUIS & MARY STUMBERG FOUNDATION
C/O ERNST & YOUNG
FROST BANK TOWER
SAN ANTONIO, TX 78205

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)
500.0000	380956409	GOLDCORP INC COM NEW*	10/06/2009	03/25/2010	18,487.26	20,874.25	-2,386.99	0.00
650.0000	380956409	GOLDCORP INC COM NEW*	10/06/2009	03/25/2010	24,264.45	27,136.53	-2,872.08	0.00
350.0000	380956409	GOLDCORP INC COM NEW*	10/06/2009	09/09/2010	14,473.16	14,611.98	-138.82	0 00
1350.0000	380956409	GOLDCORP INC COM NEW*	VARIOUS	10/21/2010	57,065.16	58,805.90	-1,740.74	0.00
150.0000	38141G104	GOLDMAN SACHS GROUP INC COM*	03/08/2010	04/21/2010	23,985.26	25,573.19	-1,587.93	0.00
150.0000	38141G104	GOLDMAN SACHS GROUP INC COM*	03/08/2010	07/22/2010	22,047.09	25,573.19	-3,526.10	0.00
51.0000	415864107	HARSCO CORPORATION COM	07/07/2009	02/11/2010	1,456.99	1,415.76	41.23	0.00
1000 0000	458140100	INTEL CORP COM *	07/01/2009	06/03/2010	21,571.43	17,319.00	4,252.43	0.00
1000 0000	458140100	INTEL CORP COM *	10/06/2009	08/30/2010	18,079.89	19,680.00	-1,600.11	0.00
204.0000	579064106	MCAFEE INC COM*	VARIOUS	01/08/2010	8,182.70	8,418.12	-235.42	0 00
180.0000	58155Q103	MCKESSON CORPORATION COM	05/21/2009	03/02/2010	11,115.74	7,255.48	3,860.26	0.00
250.0000	58405U102	MEDCO HEALTH SOLUTIONS INC COM*	04/27/2010	11/10/2010	14,807.27	16,075.70	-1,268.43	0.00
500 0000	59156R108	METLIFE INC COM*	04/30/2010	11/24/2010	19,014.67	23,366.20	-4,351 53	0.00
650.0000	61945A107	MOSAIC COMPANY COM*	07/23/2010	08/04/2010	31,396.61	30,041.83	1,354.78	0.00
672.0000	65248E104	NEWS CORP CLASS A COM	VARIOUS	12/03/2010	9,549.03	9,094.42	454.61	0.00
219 0000	670346105	NUCOR CORP COM*	03/23/2010	10/28/2010	8,288 81	10,100.30	-1,811 49	0 00
4000.0000	717081103	PFIZER INC COM *	VARIOUS	03/12/2010	67,844.74	75,067.20	-7,222 47	0.00
700.0000	747525103	QUALCOMM INC COM*	12/10/2009	01/29/2010	27,217.68	31,987.97	-4,770.29	0.00
1150.0000	747525103	QUALCOMM INC COM*	VARIOUS	03/05/2010	45,174.17	52,853.89	-7,679.72	0.00

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2010 Tax Information Statement

Account Number: F0571700
Recipient's Tax ID Number: 74-6367261
Payer's Federal ID Number: 74-6036463

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
LOUIS & MARY STUMBERG FOUNDATION
C/O ERNST & YOUNG
FROST BANK TOWER
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)
1000.0000	808513105	SCHWAB CHARLES CORP NEW COM*	09/23/2009	06/23/2010	14,822.25	19,069.84	-4,247.59	0.00
120 0000	89417E109	TRAVELERS COMPANIES INC COM *	09/21/2009	05/12/2010	6,001.74	5,665.20	336.54	0.00
250.0000	907818108	UNION PACIFIC CORP COM*	03/25/2010	10/08/2010	20,855.04	18,421.72	2,433.32	0 00
.0500	910047109	UNITED CONTINENTAL HLDGS INC COM	11/23/2009	10/13/2010	1.24	0.63	0.61	0.00
2000.0000	917047102	URBAN OUTFITTERS INC COM*	VARIOUS	01/15/2010	65,303.12	41,335.30	23,967.82	0 00
504.0000	91913Y100	VALERO ENERGY CORP NEW COM*	01/29/2010	04/21/2010	9,648.97	9,524.29	124.68	0.00
750.0000	92826C839	VISA INC CL A COM*	03/25/2010	04/30/2010	68,488.85	68,226.75	262.10	0.00
215.0000	931422109	WALGREEN CO COM*	07/07/2009	06/14/2010	6,371.35	6,299.50	71.85	0.00
Total Short Term Sales Reported on 1099-B					**830,971.51**	**820,308.35**	**10,663.13**	**0.00**
Long Term 15% Sales Reported on 1099-B								
158.0000	002824100	ABBOTT LABORATORIES COM*	VARIOUS	11/19/2010	7,454.75	7,174.47	280.28	0 00
250.0000	001055102	AFLAC INC COM*	06/23/2009	09/16/2010	12,937.28	7,519.53	5,417.75	0 00
350.0000	001055102	AFLAC INC COM*	06/23/2009	11/04/2010	20,121.15	10,527.34	9,593.81	0.00
750.0000	018490102	ALLERGAN INC COM*	VARIOUS	06/04/2010	44,624.25	45,934.27	-1,310 03	0.00
150 0000	037833100	APPLE INC COM *	02/06/2009	06/03/2010	39,201.74	14,984.73	24,217.01	0 00
50.0000	037833100	APPLE INC COM *	02/06/2009	06/29/2010	12,780.78	4,994.91	7,785.87	0.00
200 0000	071813109	BAXTER INTERNATIONAL INC COM *	12/04/2008	03/17/2010	11,645.87	10,695.26	950.61	0.00
400.0000	071813109	BAXTER INTERNATIONAL INC COM *	12/04/2008	10/08/2010	19,628.46	21,390.52	-1,762.06	0.00
250 0000	071813109	BAXTER INTERNATIONAL INC COM *	12/04/2008	10/14/2010	12,319.29	13,369.07	-1,049 78	0.00

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2010 Tax Information Statement

Account Number: F0571700
Recipient's Tax ID Number: 74-6367261
Payer's Federal ID Number: 74-6036463

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
LOUIS & MARY STUMBERG FOUNDATION
C/O ERNST & YOUNG
FROST BANK TOWER
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)
500.0000	071813109	BAXTER INTERNATIONAL INC COM *	VARIOUS	10/15/2010	24,576.09	26,087.68	-1,511.59	0.00
250.0000	075887109	BECTON DICKINSON & CO COM*	02/12/2008	02/10/2010	18,602.26	22,415.00	-3,812 74	0 00
600 0000	075887109	BECTON DICKINSON & CO COM*	VARIOUS	04/22/2010	46,050.07	51,713.50	-5,663 45	0.00
119.0000	075887109	BECTON DICKINSON & CO COM*	VARIOUS	08/31/2010	8,146.28	9,329.44	-1,183.16	0 00
184.0000	138006309	CANON INC ADR	11/15/2004	07/08/2010	7,161.20	6,384.80	776.40	0 00
400.0000	149123101	CATERPILLAR INC COM *	VARIOUS	01/25/2010	22,176.59	28,946.50	-6,769.91	0.00
200.0000	149123101	CATERPILLAR INC COM *	01/25/2008	06/24/2010	12,723.88	13,362.00	-638.12	0 00
650.0000	149123101	CATERPILLAR INC COM *	VARIOUS	07/20/2010	41,756.26	29,649.02	12,107 24	0.00
1250.0000	17275R102	CISCO SYSTEM INC COM*	08/08/2007	02/01/2010	28,140.89	40,036.33	-11,895.44	0.00
289.0000	17275R102	CISCO SYSTEM INC COM*	06/04/2008	09/16/2010	6,318.47	7,719.19	-1,400.72	0.00
750.0000	17275R102	CISCO SYSTEM INC COM*	08/08/2007	11/15/2010	14,971.24	24,021.79	-9,050.55	0.00
500.0000	17275R102	CISCO SYSTEM INC COM*	08/30/2007	11/16/2010	9,834.88	15,940.00	-6,105.12	0.00
1000.0000	192446102	COGNIZANT TECH. SOLUTIONS CL A*	VARIOUS	02/10/2010	46,279.41	30,790.56	15,488.85	0 00
250.0000	192446102	COGNIZANT TECH. SOLUTIONS CL A*	VARIOUS	07/02/2010	12,271.49	7,496.53	4,774.96	0.00
350.0000	192446102	COGNIZANT TECH. SOLUTIONS CL A*	09/08/2008	11/04/2010	22,445.12	10,317.75	12,127.37	0.00
111.0000	194162103	COLGATE-PALMOLIVE CO COM*	09/27/2007	01/27/2010	8,885.42	7,972.99	912.43	0 00
300.0000	22160K105	COSTCO WHOLESALE CORP NEW COM*	10/28/2008	06/03/2010	17,207.94	16,727.53	480.41	0.00
1150.0000	126650100	CVS CORP COM	VARIOUS	02/03/2010	37,526.32	43,975.50	-6,449.18	0.00
300.0000	244199105	DEERE & CO COM *	07/23/2009	09/16/2010	20,993.64	12,607.56	8,386.08	0.00

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2010 Tax Information Statement

Account Number: F0571700
Recipient's Tax ID Number: 74-6367261
Payer's Federal ID Number: 74-6036463

☐ Corrected ☐ 2nd TIN notice

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

Recipient's Name and Address:
LOUIS & MARY STUMBERG FOUNDATION
C/O ERNST & YOUNG
FROST BANK TOWER
SAN ANTONIO, TX 78205

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)
250.0000	244199105	DEERE & CO COM *	07/23/2009	11/10/2010	19,646.01	10,506.30	9,139.71	0.00
278.0000	254687106	DISNEY (WALT) COMPANY HOLDING CO *	VARIOUS	03/11/2010	9,342.04	7,221.96	2,120.08	0 00
158.0000	278865100	ECOLAB INC COM*	02/05/2008	03/18/2010	6,823.54	7,601.32	-777.78	0 00
600 0000	291011104	EMERSON ELECTRIC CO COM*	08/06/2008	06/29/2010	25,798.36	28,401.60	-2,603.24	0.00
237 0000	29255W100	ENCORE ACQUISITION CO COM	10/05/2007	03/16/2010	11,763.31	8,208.31	3,555.00	0.00
1000.0000	H27178104	FOSTER WHEELER AG*	02/25/2008	02/26/2010	24,782.78	79,423.32	-54,640.54	0 00
1000.0000	H27178104	FOSTER WHEELER AG*	VARIOUS	09/13/2010	23,930.50	53,811.50	-29,881.00	0 00
650.0000	H27178104	FOSTER WHEELER AG*	09/12/2008	10/20/2010	15,719.22	27,300.90	-11,581.68	0.00
.3297	35906A108	FRONTIER COMMUNICATIONS CORP COM	08/30/2007	07/20/2010	2.42	3.56	-1.14	0 00
58.0000	35906A108	FRONTIER COMMUNICATIONS CORP COM	VARIOUS	08/25/2010	435.57	584.10	-148.53	0.00
1350.0000	369604103	GENERAL ELEC CO	05/07/2009	07/02/2010	18,578 63	19,060.88	-482.25	0 00
150.0000	380956409	GOLDCORP INC COM NEW*	10/06/2009	10/21/2010	6,340.57	6,262.27	78.30	0.00
50 0000	38259P508	GOOGLE INC CL A*	06/06/2008	06/03/2010	25,343.56	28,595.60	-3,252.04	0 00
400.0000	406216101	HALLIBURTON CO COM*	VARIOUS	03/25/2010	11,984.72	15,013.37	-3,028.65	0 00
500.0000	406216101	HALLIBURTON CO COM*	VARIOUS	07/19/2010	14,400.01	19,543.89	-5,143.88	0 00
206.0000	415864107	HARSCO CORPORATION COM	12/19/2008	02/11/2010	5,885.09	5,418.29	466.80	0.00
500.0000	428236103	HEWLETT PACKARD CO COM *	09/26/2008	08/12/2010	20,079.66	24,109.55	-4,029.89	0.00

2010 Tax Information Statement

Account Number: F0571700
Recipient's Tax ID Number: 74-6367261
Payer's Federal ID Number: 74-6036463

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
LOUIS & MARY STUMBERG FOUNDATION
C/O ERNST & YOUNG
FROST BANK TOWER
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)
316.0000	438128308	HONDA MOTOR CO LTD SPONSORED ADR	VARIOUS	02/05/2010	10,769.30	8,046.61	2,722.69	0.00
750 0000	458140100	INTEL CORP COM *	07/01/2009	08/19/2010	14,168.08	12,989 25	1,178.83	0 00
1250.0000	458140100	INTEL CORP COM *	VARIOUS	08/30/2010	22,599.87	21,993.25	606.62	0.00
15250.9100	538034109	LIVE NATION ENTERTAINMENT INC COM	VARIOUS	02/22/2010	188,804.53	20,251.76	168,552.77	0.00
1150.0000	548661107	LOWES COS INC COM *	07/23/2009	12/13/2010	28,728.27	25,160.28	3,567.99	0.00
500 0000	677862104	LUKOIL OIL CO SPONSORED ADR	12/31/1987	09/07/2010	27,074.54	500.00	26,574.54	0.00
413 0000	680665205	OLIN CORP COM	07/07/2009	10/29/2010	8,262.29	4,708.20	3,554.09	0.00
400.0000	713448108	PEPSICO INC COM*	01/11/2007	04/22/2010	25,842.04	25,991.53	-149.49	0.00
350.0000	806857108	SCHLUMBERGER LIMITED COM*	06/06/2008	12/03/2010	28,135.64	36,741.88	-8,606.24	0.00
277.0000	808513105	SCHWAB CHARLES CORP NEW COM*	03/30/2009	04/01/2010	5,108.87	4,088.52	1,020.35	0.00
1500 0000	808513105	SCHWAB CHARLES CORP NEW COM*	01/15/2009	06/18/2010	23,026.78	22,993.65	33.13	0.00
1500.0000	808513105	SCHWAB CHARLES CORP NEW COM*	VARIOUS	06/23/2010	22,233.37	21,933.05	300.32	0.00
130 0000	790849103	ST. JUDE MEDICAL INC COM*	VARIOUS	06/01/2010	4,765.95	4,740.50	25 45	0 00
2000.0000	855244109	STARBUCKS CORP COM*	06/23/2009	08/19/2010	47,899.76	28,495.40	19,404.36	0.00
80 0000	855244109	STARBUCKS CORP COM*	07/15/2009	12/02/2010	2,604.60	1,144.71	1,459.89	0.00
493 0000	87236Y108	TD AMERITRADE HLDG CORP COM	VARIOUS	08/04/2010	7,816.63	7,641 41	175 22	0 00
93 0000	879382208	TELEFONICA S A SPONSORED ADR	06/03/2008	09/02/2010	6,368.15	7,856.48	-1,488.33	0.00
3835.8270	885215566	THORNBURG INTERNATIONAL VALUE FD I*	01/29/2007	04/23/2010	100,000.00	110,970.47	-10,970 47	0.00

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2010 Tax Information Statement

Account Number: F0571700
Recipient's Tax ID Number: 74-6367261
Payer's Federal ID Number: 74-6036463
☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
LOUIS & MARY STUMBERG FOUNDATION
C/O ERNST & YOUNG
FROST BANK TOWER
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	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
	(Box 1b)	*(Box 7)*		*(Box 1a)*	*(Box 2)*			*(Box 4)*
2000 0000	892356106	TRACTOR SUPPLY CO COM	12/31/1987	09/17/2010	75,767.11	3,585.00	72,182.11	0.00
250.0000	892356106	TRACTOR SUPPLY CO COM	12/31/1987	12/02/2010	11,201.81	448.13	10,753.68	0.00
100000.0000	912828GM6	U S TREASURY NOTES 4.5% 3/31/12	05/23/2007	09/15/2010	106,339.84	100,000.00	6,339.84	0.00
50000.0000	912828GM6	U S TREASURY NOTES 4.5% 3/31/12	05/23/2007	10/14/2010	53,095.70	50,000.00	3,095.70	0.00
1550.0000	903914109	ULTRA PETROLEUM CORP*	VARIOUS	03/26/2010	67,805.44	88,991.71	-21,186.27	0.00
280.0000	969904101	WILLIAMS SONOMA INC COM	12/05/2008	02/09/2010	5,451.30	2,529.32	2,921.98	0.00
311.0000	969904101	WILLIAMS SONOMA INC COM	VARIOUS	03/23/2010	8,267.33	2,786.59	5,480.74	0 00
Total Long Term 15% Sales Reported on 1099-B					**1,729,774.21**	**1,497,738.19**	**232,035.99**	**0.00**
Unknown Term (or Cost) Sales Reported on 1099-B								
.0900	538034109	LIVE NATION ENTERTAINMENT INC COM	12/31/1987	02/22/2010	1.11	0.00	0.00	0 00
Total Unknown Term (or Cost) Sales Reported on 1099-B					**1.11**	**0.00**	**0.00**	**0.00**

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