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

2011

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 2011, or tax year beginning , 2011, and ending

The Suder Foundation
3701 E. Plano Parkway
Plano, TX 75074A Employer identification number
26-3041654B Telephone number (see the instructions)
469-429-2200G Check all that apply ☐ Initial return ☐ Initial Return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name changeH Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year
(from Part II, column (c), line 16)
\$ 3,375,567.
J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis)C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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 instructions))

	(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 (att sch)	2,700,000.			
2 Ck ☐ if the foundn is not req to att Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	33,702.	33,702.	33,702.	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain/(loss) from sale of assets not on line 10	57,702.			
b Gross sales price for all assets on line 6a	284,749.			
7 Capital gain net income (from Part IV, line 2)		57,702.		
8 Net short-term capital gain			42,974.	
9 Income modifications			29,000.	
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit/(loss) (att sch)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	2,791,404.	91,404.	105,676.	
13 Compensation of officers, directors, trustees, etc	0.			
14 Other employee salaries and wages	122,608.			122,608.
15 Pension plans, employee benefits	15,765.			15,765.
16a Lease fees (attach schedule)	See St 1	1,610.		1,610.
b Accounting fees (attach sch)	See St 2	6,440.		6,440.
c Other prof fees (attach sch)	See St 3	41,193.	11,599.	29,594.
17 Interest				
18 Taxes (attach schedule)(see reg)	See Stm 4	1,163.	999.	999.
19 Depreciation (attach sch) and depletion		344.		
20 Occupancy				
21 Travel, conferences, and meetings	22,843.			22,843.
22 Printing and publications				
23 Other expenses (attach schedule)	See Statement 5	10,135.	379.	9,756.
24 Total operating and administrative expenses. Add lines 13 through 23	222,101.	12,977.	12,977.	208,616.
25 Contributions, gifts, grants paid Part XV	970,000.			999,000.
26 Total expenses and disbursements. Add lines 24 and 25	1,192,101.	12,977.	12,977.	1,207,616.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	1,599,303.			
b Net investment income (if negative, enter 0)		78,427.		
c Adjusted net income (if negative, enter 0)			92,699.	

REVENUE

ADDITIONAL
408
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AND
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EXPENSES

9-18 16

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
A S S E T S	1 Cash — non-interest-bearing	27,747.		
	2 Savings and temporary cash investments	514,837.	1,169,008.	1,169,008.
	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 instructions)			
	7 Other notes and loans receivable (attach sch) ▶			
	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 (attach schedule) Statement 6	212,834.	773,029.	781,326.
	b Investments — corporate stock (attach schedule) Statement 7	716,122.	743,186.	868,051.
	c Investments — corporate bonds (attach schedule) Statement 8	137,260.	132,498.	146,314.
L I A B I L I T I E S	11 Investments — land, buildings, and equipment basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) Statement 9	51,934.	440,002.	398,479.
	14 Land, buildings, and equipment, basis ▶ 15,219.			
	Less: accumulated depreciation (attach schedule) See Stmt 10 ▶ 2,830.	10,075.	12,389.	12,389.
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	1,670,809.	3,270,112.	3,375,567.
N E T A S S E T S	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
F U N D B A L A N C E S	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			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	1,670,809.	3,270,112.	
	30 Total net assets or fund balances (see instructions)	1,670,809.	3,270,112.	
	31 Total liabilities and net assets/fund balances (see instructions)	1,670,809.	3,270,112.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,670,809.
2 Enter amount from Part I, line 27a	2	1,599,303.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	3,270,112.
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	3,270,112.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a publicly traded securities		P	Various	Various
b publicly traded securities		P	Various	Various
c short-term capital gain distributions		P	Various	Various
d Cash in lieu		P	Various	Various
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 162,493.		147,841.	14,652.
b 83,832.		79,206.	4,626.
c 38,348.			38,348.
d 76.			76.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			14,652.
b			4,626.
c			38,348.
d			76.
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	57,702.
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 instructions) If (loss), enter -0- in Part I, line 8		3	42,974.

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 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 (column (b) divided by column (c))
2010	840,446.	1,386,770.	0.606046
2009	240,228.	1,145,521.	0.209711
2008	36,619.	1,064,840.	0.034389
2007			
2006			

2 Total of line 1, column (d)	2	0.850146
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	0.283382
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	1,675,134.
5 Multiply line 4 by line 3	5	474,703.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	784.
7 Add lines 5 and 6	7	475,487.
8 Enter qualifying distributions from Part XII, line 4	8	1,207,616.

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

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

1 a 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 letter if necessary -- see instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	784.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (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	784.
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	784.
6 Credits/Payments			
a 2011 estimated tax pmts and 2010 overpayment credited to 2011	6a	78.	
b Exempt foreign organizations -- tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	750.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	828.	
8 Enter any penalty for underpayment of estimated tax Check here ☒ if Form 2220 is attached	8	5.	
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	39.	
11 Enter the amount of line 10 to be Credited to 2012 estimated tax 39. Refunded	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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</i>		X
c 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? <i>If 'Yes,' attach a detailed description of the activities</i>		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? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see 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? <i>If 'No,' attach explanation</i>	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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>	X	
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		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 make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>www.suderfoundation.org</u>	13	X	
14	The books are in care of <u>Diane Schorr</u> Telephone no. <u>469-429-2200</u> Located at <u>3701 E. Plano Parkway Plano TX</u> ZIP + 4 <u>75074</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here and enter the amount of tax-exempt interest received or accrued during the year	N/A	☐	N/A
16	At any time during calendar year 2011, 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 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 instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>	☐ Yes ☒ No	
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)	2b	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. ► <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
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 2011 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 2011)	3b	N/A
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 2011?	4b	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)? (see 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 ☒ Nob If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

☐

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

N/A ☐ Yes ☐ No

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

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

☐ Yes ☒ No

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 (see 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
Eric Suder 3701 E. Plano Parkway Plano, TX 75074	Director 8.00	0.	0.	0.
Aaron J. Suder 3701 E. Plano Parkway Plano, TX 75074	Director 0.50	0.	0.	0.
Andrew Stanaland 3701 E. Plano Parkway Plano, TX 75074	Director 1.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see 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
Diane Schorr 3701 E. Plano Parkway Plano, TX 75074	Executive Dir 40	70,000.	8,994.	0.

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services (see 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		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 See Statement 11	
	1,207,616.
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	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	1,332,380.
b Average of monthly cash balances	1b	368,264.
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1d	1,700,644.
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	1,700,644.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	25,510.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,675,134.
6 Minimum investment return. Enter 5% of line 5	6	83,757.

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	N/A	1	
2a Tax on investment income for 2011 from Part VI, line 5	2a		
b Income tax for 2011 (This does not include the tax from Part VI)	2b		
c Add lines 2a and 2b		2c	
3 Distributable amount before adjustments. Subtract line 2c from line 1		3	
4 Recoveries of amounts treated as qualifying distributions		4	
5 Add lines 3 and 4		5	
6 Deduction from distributable amount (see instructions)		6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	

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	1,207,616.
b Program-related investments — total from Part IX-B	1b	
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 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,207,616.
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 instructions)	5	784.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,206,832.

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

Part XIII Undistributed Income (see instructions)

N/A

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only				
b Total for prior years 20 __, 20 __, 20 __				
3 Excess distributions carryover, if any, to 2011				
a From 2006				
b From 2007				
c From 2008				
d From 2009				
e From 2010				
f Total of lines 3a through e				
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ _____				
a Applied to 2010, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2011 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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 instructions				
e Undistributed income for 2010. Subtract line 4a from line 2a Taxable amount — see instructions				
f Undistributed income for 2011. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2007				
b Excess from 2008				
c Excess from 2009				
d Excess from 2010				
e Excess from 2011				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, 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				(e) Total
	(a) 2011	(b) 2010	(c) 2009	(d) 2008	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	83,757.	29,516.	30,039.	7,167.	150,479.
b 85% of line 2a	71,193.	25,089.	25,533.	6,092.	127,907.
c Qualifying distributions from Part XII, line 4 for each year listed	1,207,616.	840,768.	240,443.	36,619.	2,325,446.
d Amounts included in line 2c not used directly for active conduct of exempt activities	999,000.	653,500.	114,649.		1,767,149.
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	208,616.	187,268.	125,794.	36,619.	558,297.
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	55,838.	46,226.	38,184.	19,060.	159,308.
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 organization had \$5,000 or more in assets at any time during the year — see 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).)

Eric Suder

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.

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Statement 12				
Total				999,000.
b Approved for future payment				
Total				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	33,702.	
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					
8 Gain or (loss) from sales of assets other than inventory			18	57,702.	
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)				91,404.	
13 Total. Add line 12, columns (b), (d), and (e)				13	91,404.

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545 0047

2011

Name of the organization

The Suder Foundation

Employer identification number

26-3041654

Organization type (check one).

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 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, total 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 total 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 Part I, 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).

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2011)

Name of organization

Employer identification number

The Suder Foundation

26-3041654

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Eric Suder 3701 E. Plano Parkway Plano, TX 75074	\$ 2,700,000.	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.)
			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

Employer identification number

The Suder Foundation

26-3041654

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2011)

Name of organization

The Suder Foundation

Employer identification number

26-3041654

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete cols (a) through (e) and the following line entryFor organizations completing Part III, enter total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.)

► \$ N/A

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

The Suder Foundation

26-3041654

Statement 1
Form 990-PF, Part I, Line 16a
Legal Fees

	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Legal services	\$ 1,610.			\$ 1,610.
Total	<u>\$ 1,610.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 1,610.</u>

Statement 2
Form 990-PF, Part I, Line 16b
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Accounting and tax preparation	\$ 6,440.			\$ 6,440.
Total	<u>\$ 6,440.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 6,440.</u>

Statement 3
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Achievement Tec staff assessments	\$ 1,350.			\$ 1,350.
CECS Research/data/brand consultants	26,000.			26,000.
Center for Nonprofit Managment	2,188.			2,188.
Graphics design	56.			56.
Merrill Lynch investment mgmt	11,599.	\$ 11,599.	\$ 11,599.	
Total	<u>\$ 41,193.</u>	<u>\$ 11,599.</u>	<u>\$ 11,599.</u>	<u>\$ 29,594.</u>

Statement 4
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise tax paid	\$ 164.			
Foreign tax paid	999.	\$ 999.	\$ 999.	
Total	<u>\$ 1,163.</u>	<u>\$ 999.</u>	<u>\$ 999.</u>	<u>\$ 0.</u>

The Suder Foundation

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Statement 5
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Amortization	\$ 785.			\$ 785.
Bank service charges	379.	\$ 379.	\$ 379.	
Memberships	1,495.			1,495.
Miscellaneous	408.			408.
Office expenses	1,131.			1,131.
Payroll processing fees	2,080.			2,080.
Postage & delivery	40.			40.
Publications and subscriptions	328.			328.
Student Strengths Inventory assessments	2,543.			2,543.
Telephone and telecommunications	495.			495.
Website & domain expenses	451.			451.
Total	<u>\$ 10,135.</u>	<u>\$ 379.</u>	<u>\$ 379.</u>	<u>\$ 9,756.</u>

Statement 6
Form 990-PF, Part II, Line 10a
Investments - U.S. and State Government Obligations

U.S. Government Obligations	Valuation Method	Book Value	Fair Market Value
Merrill Lynch (540-04012-see attached)	Cost	\$ 545,316.	\$ 544,250.
Merrill Lynch (540-04060-see attached)	Cost	227,713.	237,076.
		<u>\$ 773,029.</u>	<u>\$ 781,326.</u>
Total		<u>\$ 773,029.</u>	<u>\$ 781,326.</u>

Statement 7
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
Merrill Lynch (540-04061-see attached)	Cost	\$ 207,420.	\$ 240,778.
Merrill Lynch (540-04062-see attached)	Cost	227,790.	279,659.
Merrill Lynch (540-04063-see attached)	Cost	146,023.	133,059.
Merrill Lynch (540-04064-see attached)	Cost	161,953.	214,555.
Total		<u>\$ 743,186.</u>	<u>\$ 868,051.</u>

The Suder Foundation

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Statement 8
Form 990-PF, Part II, Line 10c
Investments - Corporate Bonds

<u>Corporate Bonds</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Merrill Lynch (540-04060-see attached)	Cost	\$ 132,498.	\$ 146,314.
	Total	<u>\$ 132,498.</u>	<u>\$ 146,314.</u>

Statement 9
Form 990-PF, Part II, Line 13
Investments - Other

<u>Other Publicly Traded Securities</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Merrill Lynch (540-04012-see attached)	Cost	\$ 440,002.	\$ 398,479.
	Total	<u>\$ 440,002.</u>	<u>\$ 398,479.</u>

Statement 10
Form 990-PF, Part II, Line 14
Land, Buildings, and Equipment

<u>Category</u>	<u>Basis</u>	<u>Accum. Deprec.</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Machinery and Equipment	\$ 3,443.	\$ 344.	\$ 3,099.	\$ 3,099.
Miscellaneous	11,776.	2,486.	9,290.	9,290.
Total	<u>\$ 15,219.</u>	<u>\$ 2,830.</u>	<u>\$ 12,389.</u>	<u>\$ 12,389.</u>

Statement 11
Form 990-PF, Part IX-A, Line 1
Summary of Direct Charitable Activities

<u>Direct Charitable Activities</u>	<u>Expenses</u>
The Suder Foundation operates First Scholars, a comprehensive student success program for first-generation college students. The four-year program provides selected scholars with individualized academic and social support, personal development programming, and financial assistance designed to ease their transition to college and aid in their persistence to graduation. First Scholars operates at a national network of affiliated universities including University of Kentucky, The University of Alabama, Southern Illinois University Carbondale, The University of Memphis and Washington State University.	\$ 1,207,616.

The Suder Foundation

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Statement 12
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
University of Kentucky 219 Sturgill Development Building Lexington, KY 40506	N/A	509(a)(1)	First Scholars - scholarships	\$ 200,000.
University of Kentucky Research Fnd P. O. Box 931113 Cleveland, OH 44193	N/A	509(a)(1)	First Scholars - program operating funds	135,000.
University of Utah 195 Central Campus Drive, #132 Salt Lake City, UT 84112	N/A	509(a)(1)	First Scholars - scholarships	100,000.
Southern Illinois University Foundation 1235 Douglas Drive, Colyer Hall Carbondale, IL 62901	N/A	509(a)(1)	First Scholars - scholarships and program operating funds	222,000.
University of Alabama 284 Rose Admin. Bldg., Box 870122 Tuscaloosa, AL 35487	N/A	509(a)(1)	First Scholars - scholarships and program operating funds	222,000.
The University of Memphis Foundation c/o Julie Johnson, 323 Admin. Bldg. Memphis, TN 38152	N/A	509(a)(1)	First Scholars - program planning funds	60,000.
Washington State University P. O. Box 643140 Pullman, WA 99164	N/A	509(a)(1)	First Scholars - program planning funds	60,000.
Total				\$ <u>999,000.</u>

12/31/11

2011 Federal Book Summary Depreciation Schedule

Page 1

Client SUDER

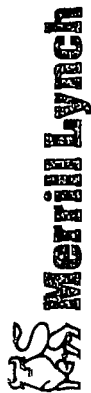
The Suder Foundation

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6/20/12

08 58PM

No.	Description	Date Acquired	Date Sold	Cost/ Basis	Bus Pct.	Cur 179/ SDA	Prior 179/ SDA/ Depr.	Method	Life	Current Depr.
Form 990/990-PF										
Machinery and Equipment										
1	Dell PC for NPM	4/05/11		2,391				S/L HY	5	239
2	Dell PC for Exec Dir	9/02/11		1,052				S/L HY	5	105
Total Machinery and Equipment				3,443		0	0			344
Total Depreciation				3,443		0	0			344
Grand Total Depreciation				3,443		0	0			344



THE SUDER FOUNDATION

EMA Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Accrued Interest	Est Annual Income
Cash and Money Funds							
	CASH		294.33	294.33			
51,794	ML BANK DEPOSIT PROGRAM	12/14/11	51,794.00	51,794.00			41.43
	Total Cash and Money Funds		52,088.33	52,088.33			41.43
Government Securities							
37,000	U.S. TSY INFLATION BOND 3.875% APR 15 2029 INFL ADJ PRIN 50,967	12/15/11	79,630.45	79,417.56	(212.89)	297.72	1,975.00
170,000	U.S. TRSY INFLATION NOTE 1.875% JUL 15 2015 INFL ADJ PRIN 197,917	12/15/11	218,539.54	218,265.29	(274.25)	1,455.16	3,711.00
167,000	U.S. TRSY INFLATION NOTE 2.625% JUL 15 2017 INFL ADJ PRIN 182,465	12/15/11	217,829.64	217,205.55	(624.09)	2,001.28	4,790.00
25,000	U.S. TRSY INFLATION NTE 1.250% JUL 15 2020 INFL ADJ PRIN 25,959	12/15/11	29,316.92	29,361.97	45.05	142.66	325.00
	Total Government Securities		545,316.55	544,250.37	(1,066.18)	3,896.82	10,801.00

PLEASE SEE REVERSE SIDE
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Statement Period Year Ending 12/31/11
Account No. 540-04012





THE SUDER FOUNDATION

EMATM Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
36,424	FIXED INCOME SHARES SERIES R	12/15/11	440,001.92	398,478.56	(41,523.36)	14,931.00
Total Mutual Funds/Closed End Funds/UIT			440,001.92	398,478.56	(41,523.36)	14,931.00

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Statement Period Year Ending 12/31/11
Account No. 540-04012



THE SUDER FOUNDATION

EMA Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Accrued Interest	Est Annual Income
Cash and Money Funds							
	CASH		52.79	52.79			
16,197	ML BANK DEPOSIT PROGRAM	10/10/08	16,197.00	16,197.00			24.29
34	BIF MONEY FUND		34.00	34.00			
	Total Cash and Money Funds		16,283.79	16,283.79			24.29
Government Securities							
19,928	FHLMC A9 3784 04 50%2040 AMORTIZED FACTOR 0.833286820 AMORTIZED VALUE 16,605	08/25/11	17,487.92	17,606.17	118.25		748.00
19,000	FHLMC C0 3565 04%2040 AMORTIZED FACTOR 0.840418350 AMORTIZED VALUE 15,967	12/01/10	16,012.86	16,771.73	758.87		639.00
6,000	FEDERAL HOME LN MTG CORP NOTES 05.125% JUL 15 2012	08/05/08	6,042.03	6,161.88	119.85	140.94	308.00
8,000	FEDERAL HOME LN MTG CORP ORIGINAL UNIT/TOTAL COST: 110.3790/8,830 32	05/08/09	8,144.01	8,215.84	71.83	187.92	410.00
3,000	U.S. TREASURY NOTE 2.625% DEC 31 2014 02.625% DEC 31 2014	07/15/11	3,162.01	3,199.68	37.67	39.16	79.00
1,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 106.8630/1,068.63	09/30/11	1,063.55	1,066.56	3.01	13.05	27.00

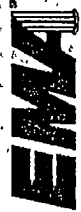
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Statement Period Year Ending 12/31/11
Account No. 540-04060





THE SUDER FOUNDATION



Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Accrued Interest	Est Annual Income
Government Securities							
10,000	U.S. TREASURY NOTE 4.875% FEB 15 2012 04.875% FEB 15 2012	09/10/09	10,047.21	10,056.60	9.39	181.49	488.00
3,000	U.S. TREASURY NOTE 4.375% AUG 15 2012 04.375% AUG 15 2012	11/18/08	3,056.72	3,078.99	22.27	48.86	132.00
5,000	U.S. TREASURY NOTE 3.125% MAY 15 2019 03.125% MAY 15 2019	02/01/10	4,811.54	5,606.25	794.71	19.32	157.00
2,000	U.S. TREASURY NOTE	02/26/10	1,935.55	2,242.50	306.95	7.73	63.00
6,000	U.S. TREASURY NOTE	03/31/10	5,715.26	6,727.50	1,012.24	23.18	188.00
8,000	U.S. TREASURY NOTE	06/04/10	7,984.41	8,970.00	985.59	30.91	250.00
2,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 104.6955/2,093.91	09/03/10	2,080.98	2,242.50	161.52	7.73	63.00
7,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 100.9535/7,066.75	01/04/11	7,059.71	7,848.75	789.04	27.04	219.00
4,000	U.S. TREASURY NOTE	04/01/11	3,999.55	4,485.00	485.45	15.45	125.00
11,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 103.5355/11,388.91	06/29/11	11,366.51	12,333.75	967.24	42.50	344.00

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Statement Period Year Ending 12/31/11
Account No. 540-04060

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00-17 6060B (R02-10)





THE SUDER FOUNDATION



Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Accrued Interest	Est Annual Income
Government Securities							
5,000	U.S. TREASURY NOTE 1.750% JAN 31 2014 01.750% JAN 31 2014	07/01/10	5,045.82	5,152.75	106.93	36.14	88.00
43,000	U.S. TREASURY NOTE 4.250% SEP 30 2012 04.250% SEP 30 2012	09/25/09	43,901.93	44,311.93	410.00	454.38	1,828.00
9,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 108.5706/9,771.36	10/08/09	9,197.66	9,274.59	76.93	95.10	383.00
4,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 104.6057/4,184.23	08/01/11	4,118.82	4,122.04	3.22	42.27	170.00
2,000	U.S. TREASURY NOTE 2.625% NOV 15 2020 02.625% NOV 15 2020	06/30/11	1,928.37	2,153.12	224.75	6.49	53.00
6,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 104.9808/6,298.85	09/01/11	6,289.11	6,459.36	170.25	19.47	158.00
7,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 107.1015/7,497.11	09/30/11	7,484.83	7,535.92	51.09	22.72	184.00
1,000	U.S. TREASURY NOTE 2.625% JUN 30 2014 02.625% JUN 30 2014	06/30/11	1,044.89	1,056.88	11.99	13.05	27.00

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Government Securities							
3,000	U.S. TREASURY NOTE 3.875% FEB 15 2013 03.875% FEB 15 2013	05/08/09	3,081.32	3,123.51	42.19	43.28	117.00
1,000	U.S. TREASURY NOTE 2.750% NOV 30 2016 02.750% NOV 30 2016	05/07/10	997.26	1,091.80	94.54	2.25	28.00
4,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 101.9692/4,078.77	02/01/11	4,067.18	4,367.20	300.02	9.02	110.00
1,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 102.8050/1,028.05	04/29/11	1,024.88	1,091.80	66.92	2.25	28.00
13,000	U.S. TRSY INFLATION NTE 0.625% JUL 15 2021 INFL ADJ PRIN 13,061	08/01/11	13,450.04	13,972.93	522.89	37.09	82.00
4,000	U.S. TREASURY NOTE 3.125% MAY 15 2021 03.125% MAY 15 2021	06/15/11	4,046.31	4,466.24	419.93	15.45	125.00
7,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 110.0317/7,702.22	11/01/11	7,691.34	7,815.92	124.58	27.04	219.00
4,000	U.S. TREASURY NOTE ORIGINAL UNIT/TOTAL COST: 109.4060/4,376.24	12/01/11	4,373.34	4,466.24	92.90	15.45	125.00
Total Government Securities			227,712.92	237,075.93	9,363.01	1,626.73	7,965.00

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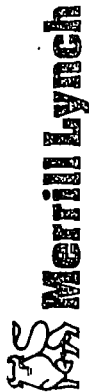
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Corporate Bonds							
3,000	AMERICAN EXPRESS GLB 06.150% AUG 28 2017	08/08/08	2,897.45	3,430.95	533.50	62.52	185.00
3,000	ASTRAZENECA PLC GLB 05.900% SEP 15 2017	08/08/08	3,069.88	3,623.70	553.82	51.62	177.00
2,000	ASTRAZENECA PLC ORIGINAL UNIT/TOTAL COST: 106.9000/2,138.00	05/14/09	2,100.38	2,415.80	315.42	34.42	118.00
3,000	ABBOTT LABORATORIES GLB 05.875% MAY 15 2016	08/08/08	3,071.11	3,519.33	448.22	22.03	177.00
2,000	ABBOTT LABORATORIES ORIGINAL UNIT/TOTAL COST: 109.1050/2,182.10	05/14/09	2,120.22	2,346.22	226.00	14.69	118.00
3,000	BP CAPITAL MARKETS PLC COMPANY GUARNT GLB 01 700% DEC 05 2014	12/08/11	3,022.90	3,028.92	6.02	3.40	51.00
3,000	IBM CORP GLB 04.750% NOV 29 2012	08/07/08	3,018.47	3,102.18	83.71	12.27	143.00
2,000	IBM CORP ORIGINAL UNIT/TOTAL COST: 107.0625/2,141.25	05/14/09	2,037.72	2,068.12	30.40	8.18	95.00

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Corporate Bonds							
7,000	CITIGROUP INC SUBORDINATED GLB 05.000% SEP 15 2014	08/08/08	6,412.19	6,927.97	515.78	102.08	350.00
4,000	CVS CAREMARK CORP 05.750% JUN 01 2017 MOODY'S: BAA2 S&P: BBB +	08/08/08	3,939.76	4,667.36	727.60	18.53	230.00
1,000	CVS CAREMARK CORP ORIGINAL UNIT/TOTAL COST: 101.7400/1,017.40	05/14/09	1,012.54	1,166.84	154.30	4.63	58.00
3,000	COMCAST CORP COMPANY GUARNT GLB 06.300% NOV 15 2017	08/08/08	3,006.92	3,548.40	541.48	23.63	189.00
3,000	CONOCOPHILLIPS COMPANY GUARNT GLB 04.750% FEB 01 2014	05/14/09	3,072.80	3,240.06	167.26	58.98	143.00
4,000	DIRECTV HLDG/FIN INC COMPANY GUARNT 03.500% MAR 01 2016	03/16/11	4,050.82	4,123.68	72.86	46.28	140.00
4,000	DAIMLERCHRYSLER NA HLDG COMPANY GUARNT GLB 06.500% NOV 15 2013	08/08/08	4,020.77	4,356.80	336.03	32.50	260.00
3,000	DAIMLERCHRYSLER NA HLDG ORIGINAL UNIT/TOTAL COST: 100.2500/3,007.50	05/14/09	3,003.40	3,267.60	264.20	24.38	195.00

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Corporate Bonds							
4,000	EXELON CORP 04.900% JUN 15 2015 MOODY'S: BAA1 S&P: BBB-	08/08/08	3,680.40	4,309.92	629.52	8.17	196.00
4,000	ENTERPRISE PRODUCTS OPER COMPANY GUARNT 05.200% SEP 01 2020	04/15/11	4,165.07	4,427.40	262.33	68.76	208.00
4,000	GOLDMAN SACHS GROUP INC GLB 05.375% MAR 15 2020	05/03/11	4,164.11	3,948.08	(216.03)	62.71	215.00
2,000	JPMORGAN CHASE GLB 04.750% MAR 01 2015	08/08/08	1,881.54	2,127.14	245.60	31.40	95.00
5,000	JPMORGAN CHASE	05/14/09	4,992.00	5,317.85	325.85	78.51	238.00
3,000	JOHN DEERE CAPITAL CORP GLB 07.000% MAR 15 2012	08/08/08	3,015.09	3,040.83	25.74	61.25	210.00
2,000	JOHN DEERE CAPITAL CORP ORIGINAL UNIT/TOTAL COST: 108 0625/2,161.25	05/14/09	2,012.28	2,027.22	14.94	40.83	140.00
3,000	KRAFT FOODS INC GLB 05.375% FEB 10 2020	02/17/10	3,033.31	3,461.55	428.24	62.71	162.00
3,000	MORGAN STANLEY SUBORDINATED GLB 04 750% APR 01 2014	08/14/08	2,627.20	2,955.27	328.07	35.23	143.00

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Corporate Bonds							
3,000	BOTTING GROUP INC COMPANY GUARNT GLB 06.950% MAR 15 2014	05/14/09	3,216.39	3,372.06	155.67	60.81	209.00
3,000	Pfizer Inc. 6.20% DUE 3/15/2019 MOODY'S: A1 S&P: AA	03/19/09	3,126.29	3,701.73	575.44	54.25	186.00
2,000	Pfizer Inc. ORIGINAL UNIT/TOTAL COST: 108.0890/2,161.78	05/14/09	-2,126.19	2,467.82	341.63	36.17	124.00
3,000	TIME WARNER CABLE INC COMPANY GUARNT GLB 08.750% FEB 14 2019	12/03/08	3,012.89	3,830.79	817.90	99.17	263.00
4,000	TIME WARNER INC COMPANY GUARNT 04.875% MAR 15 2020	08/16/10	4,264.80	4,334.52	69.72	56.88	195.00
3,000	UNITED PARCEL SERVICE GLB 05.500% JAN 15 2018	08/08/08	3,041.08	3,595.02	553.94	75.62	165.00
2,000	UNITED PARCEL SERVICE ORIGINAL UNIT/TOTAL COST 107.6500/2,153.00	05/14/09	2,112.68	2,396.68	284.00	50.42	110.00
3,000	WAL-MART STORES INC GLB 05.800% FEB 15 2018	08/08/08	3,083.53	3,670.80	587.27	65.25	174.00

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Corporate Bonds							
2,000	WAL-MART STORES INC ORIGINAL UNIT/TOTAL COST: 110.9700/2,219.40	05/14/09	2,161.96	2,447.20	285.24	43.50	116.00
2,000	USD CAN NATURAL RES 5.700% MAY 15 2017 MOODY'S: BAA1 S&P: BBB +	08/08/08	1,962.05	2,364.72	402.67	14.25	114.00
3,000	USD CAN NATURAL RES	05/14/09	2,985.00	3,547.08	562.08	21.38	171.00
4,000	TELEFONICA EMISIONES SAU COMPANY GUARNT GLB 03.992% FEB 16 2016	02/10/11	3,968.16	3,846.00	(122.16)	59.44	160.00
3,000	GLAXOSMITHKLINE CAPITAL COMPANY GUARNT GLB 05.650% MAY 15 2018	08/07/08	3,008.74	3,610.83	602.09	21.19	170.00
2,000	GLAXOSMITHKLINE CAPITAL ORIGINAL UNIT/TOTAL COST: 106.8830/2,137.66	05/14/09	2,103.32	2,407.22	303.90	14.13	113.00
3,000	CATERPILLAR FINANCIAL SE SER MTN 07.150% FEB 15 2019	05/14/09	3,073.38	3,842.37	768.99	80.44	215.00
3,000	WACHOVIA CORP SER MTN GLB 05.700% AUG 01 2013	08/08/08	2,803.11	3,185.61	382.50	70.77	171.00
2,000	GENERAL ELEC CAP CORP SER GMTN 05.250% OCT 19 2012	08/14/08	2,007.41	2,069.94	62.53	20.71	105.00



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5,000	GENERAL ELEC CAP CORP ORIGINAL UNIT/TOTAL COST: 101.0532/5,052.66	05/14/09	5,013.10	5,174.85	161.75	51.77	263.00
Total Corporate Bonds			132,498.41	146,314.43	13,816.02	1,865.86	7,260.00

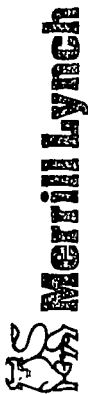
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Cash and Money Funds							
	CASH		89.46	89.46			
5,030	ML BANK DEPOSIT PROGRAM	11/17/08	5,030.00	5,030.00			7.54
5,646	BIF MONEY FUND		5,646.00	5,646.00			0.56
	Total Cash and Money Funds		10,765.46	10,765.46			8.10

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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
31	AGILENT TECHNOLOGIES INC	08/05/08	1,113.53	1,082.83	(30.70)	
40	AGILENT TECHNOLOGIES INC	02/09/09	767.97	1,397.20	629.23	
28	AGILENT TECHNOLOGIES INC	05/08/09	531.44	978.04	446.60	
15	AGILENT TECHNOLOGIES INC	07/15/10	423.45	523.95	100.50	
35	AMERIPRISE FINL INC	08/05/08	1,496.96	1,737.40	240.44	40.00
15	AMERIPRISE FINL INC	05/08/09	416.25	744.60	328.35	17.00
186	AMER EXPRESS COMPANY	08/05/08	7,012.21	8,773.62	1,761.41	134.00
70	AMER EXPRESS COMPANY	05/08/09	1,890.70	3,301.90	1,411.20	51.00

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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
35	AMER EXPRESS COMPANY	07/15/10	1,484.93	1,650.95	166.02	26.00
26	BANK NEW YORK MELLON CORP	08/05/08	947.92	517.66	(430.26)	14.00
15	BANK NEW YORK MELLON CORP	11/18/08	415.38	298.65	(116.73)	8.00
65	BANK NEW YORK MELLON CORP	03/09/09	1,161.99	1,294.15	132.16	34.00
29	BANK NEW YORK MELLON CORP	05/08/09	887.40	577.39	(310.01)	16.00
70	BANK NEW YORK MELLON CORP	12/17/09	1,871.99	1,393.70	(478.29)	37.00
10	BANK NEW YORK MELLON CORP	06/08/10	250.35	199.10	(51.25)	6.00
45	BANK NEW YORK MELLON CORP	07/15/10	1,186.00	895.95	(290.05)	24.00
25	BANK NEW YORK MELLON CORP	10/07/10	662.50	497.75	(164.75)	13.00
19	BANK NEW YORK MELLON CORP	04/08/11	573.00	378.29	(194.71)	10.00
13	BANK NEW YORK MELLON CORP	04/11/11	392.56	258.83	(133.73)	7.00

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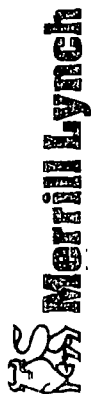
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Equities						
147	BANK NEW YORK MELLON CORP	07/29/11	3,702.67	2,926.77	(775.90)	77.00
60	BANK NEW YORK MELLON CORP	08/11/11	1,187.95	1,194.60	6.65	32.00
7	BANK NEW YORK MELLON CORP	08/30/11	144.49	139.37	(5.12)	4.00
35	BAXTER INTERNTL INC	07/28/10	1,542.79	1,731.80	189.01	47.00
26	BECTON DICKINSON CO	06/16/09	1,746.93	1,942.72	195.79	47.00
10	BECTON DICKINSON CO	07/15/10	689.90	747.20	57.30	18.00
80	BERKSHIRE HATHAWAYINC DEL CL B NEW	08/05/08	6,152.01	6,104.00	(48.01)	
50	BERKSHIRE HATHAWAYINC DEL CL B NEW	05/08/09	3,098.00	3,815.00	717.00	
23	BED BATH & BEYOND INC	08/05/08	662.18	1,333.31	671.13	
7	BED BATH & BEYOND INC	05/08/09	196.21	405.79	209.58	
45	BED BATH & BEYOND INC	10/27/09	1,618.80	2,608.65	989.85	
25	BED BATH & BEYOND INC	07/15/10	927.75	1,449.25	521.50	
79	CVS CAREMARK CORP	08/05/08	2,901.64	3,221.62	319.98	52.00
25	CVS CAREMARK CORP	12/01/08	691.29	1,019.50	328.21	17.00

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Equities						
6	CVS CAREMARK CORP	02/09/09	168.30	244.68	76.38	4.00
57	CVS CAREMARK CORP	05/08/09	1,824.00	2,324.46	500.46	38.00
20	CVS CAREMARK CORP	12/24/09	642.95	815.60	172.65	13.00
30	CVS CAREMARK CORP	01/14/10	1,016.92	1,223.40	206.48	20.00
45	CVS CAREMARK CORP	06/15/10	1,439.93	1,835.10	395.17	30.00
10	CVS CAREMARK CORP	07/15/10	304.40	407.80	103.40	7.00
50	CVS CAREMARK CORP	08/19/10	1,434.84	2,039.00	604.16	33.00
74	CANADIAN NATURAL RES LTD	08/05/08	2,695.45	2,765.38	69.93	27.00
48	CANADIAN NATURAL RES LTD	02/09/09	949.59	1,793.76	844.17	18.00
40	CANADIAN NATURAL RES LTD	05/08/09	1,081.60	1,494.80	413.20	15.00
20	CANADIAN NATURAL RES LTD	07/15/10	700.00	747.40	47.40	8.00
46	CANADIAN NATURAL RES LTD	08/09/11	1,544.52	1,719.02	174.50	17.00
10	CANADIAN NATURAL RES LTD	09/22/11	298.97	373.70	74.73	4.00
102	COSTCO WHOLESALE CRP DEL	08/05/08	6,491.29	8,498.64	2,007.35	98.00
81	COSTCO WHOLESALE CRP DEL	05/08/09	3,721.95	6,748.92	3,026.97	78.00
10	COSTCO WHOLESALE CRP DEL	07/15/10	559.80	833.20	273.40	10.00
22	COCA COLA COM	02/03/10	1,205.54	1,539.34	333.80	42.00

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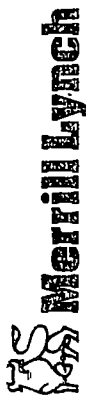
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Equities						
10	COCA COLA COM	03/18/10	538.67	699.70	161.03	19.00
18	COCA COLA COM	05/24/10	930.28	1,259.46	329.18	34.00
15	COCA COLA COM	07/15/10	789.90	1,049.55	259.65	29.00
32	DIAGEO PLC SP5D ADR NEW	08/05/08	2,329.92	2,797.44	467.52	84.00
9	DIAGEO PLC SP5D ADR NEW	02/09/09	497.07	786.78	289.71	24.00
14	DIAGEO PLC SP5D ADR NEW	05/08/09	736.12	1,223.88	487.76	37.00
71	DEVON ENERGY CORP NEW	08/05/08	6,267.78	4,402.00	(1,865.78)	49.00
8	DEVON ENERGY CORP NEW	02/09/09	478.56	496.00	17.44	6.00
19	DEVON ENERGY CORP NEW	05/08/09	1,201.37	1,178.00	(23.37)	13.00
45	DEVON ENERGY CORP NEW	07/15/10	2,805.14	2,790.00	(15.14)	31.00
73	DISNEY (WALT) CO COM STK	08/11/11	2,379.26	2,737.50	358.24	44.00
26	EXPRESS SCRIPTS INC COM	08/05/08	919.36	1,161.94	242.58	
32	EXPRESS SCRIPTS INC COM	05/06/10	1,597.70	1,430.08	(167.62)	
35	EXPRESS SCRIPTS INC COM	07/15/10	1,663.20	1,564.15	(99.05)	
5	EXPRESS SCRIPTS INC COM	07/16/10	237.05	223.45	(13.60)	
62	EOG RESOURCES INC	08/05/08	5,782.13	6,107.62	325.49	40.00
5	EOG RESOURCES INC	04/02/09	301.60	492.55	190.95	4.00





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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
19	EOG RESOURCES INC	05/08/09	1,425.57	1,871.69	446.12	13.00
25	EOG RESOURCES INC	07/15/10	2,603.50	2,462.75	(140.75)	16.00
51	GRUPO TELEVISA SA ADR	02/09/09	729.78	1,074.06	344.28	8.00
28	GRUPO TELEVISA SA ADR	05/08/09	486.36	589.68	103.32	4.00
1	GOOGLE INC CL A	02/09/09	378.58	645.90	267.32	
3	GOOGLE INC CL A	05/08/09	1,195.23	1,937.70	742.47	
1	GOOGLE INC CL A	07/15/10	488.79	645.90	157.11	
4	GOOGLE INC CL A	05/16/11	2,081.67	2,583.60	501.93	
70	HARLEY DAVIDSON INC WIS	08/05/08	2,754.51	2,720.90	(33.61)	35.00
7	HARLEY DAVIDSON INC WIS	02/09/09	100.93	272.09	171.16	4.00
35	HARLEY DAVIDSON INC WIS	05/08/09	687.75	1,360.45	672.70	18.00
10	HARLEY DAVIDSON INC WIS	07/15/10	245.70	388.70	143.00	5.00
40	HARLEY DAVIDSON INC WIS	08/11/11	1,445.30	1,554.80	109.50	20.00
15	HEWLETT PACKARD CO DEL	08/05/08	662.70	386.40	(276.30)	8.00
40	HEWLETT PACKARD CO DEL	10/24/08	1,290.82	1,030.40	(260.42)	20.00
3	HEWLETT PACKARD CO DEL	02/09/09	108.75	77.28	(31.47)	2.00
29	HEWLETT PACKARD CO DEL	05/08/09	976.14	747.04	(229.10)	14.00

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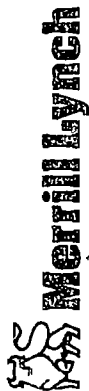
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THE SUDER FOUNDATION

EMA Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
72	IRON MOUNTAIN INC NEW	08/05/08	2,025.95	2,217.60	191.65	72.00
42	IRON MOUNTAIN INC NEW	02/09/09	901.11	1,293.60	392.49	42.00
44	IRON MOUNTAIN INC NEW	05/08/09	1,242.56	1,355.20	112.64	44.00
35	IRON MOUNTAIN INC NEW	07/15/10	837.90	1,078.00	240.10	35.00
10	IRON MOUNTAIN INC NEW	10/12/10	208.41	308.00	99.59	10.00
11	JOHNSON AND JOHNSON COM	10/21/08	708.19	721.38	13.19	26.00
7	JOHNSON AND JOHNSON COM	02/09/09	408.64	459.06	50.42	16.00
10	JOHNSON AND JOHNSON COM	03/05/09	479.73	655.80	176.07	23.00
28	JOHNSON AND JOHNSON COM	05/08/09	1,552.60	1,836.24	283.64	64.00
12	JOHNSON AND JOHNSON COM	09/24/09	729.56	786.96	57.40	28.00
18	JOHNSON AND JOHNSON COM	04/27/10	1,164.99	1,180.44	15.45	42.00
16	JOHNSON AND JOHNSON COM	06/14/10	938.77	1,049.28	110.51	37.00
15	JOHNSON AND JOHNSON COM	07/15/10	902.40	983.70	81.30	35.00
70	KRAFT FOODS INC VA CL A	02/11/11	2,138.55	2,615.20	476.65	82.00
28	LOCKHEED MARTIN CORP	11/11/10	1,968.73	2,265.20	296.47	112.00
113	LOEWS CORP	08/05/08	4,875.65	4,254.45	(621.20)	29.00
10	LOEWS CORP	02/09/09	251.60	376.50	124.90	3.00

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CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
44	LOEWS CORP	05/08/09	1,230.68	1,656.60	425.92	11.00
56	LOEWS CORP	07/15/10	2,010.15	2,108.40	98.25	14.00
16	MONSANTO CO NEW DEL COM	02/05/10	1,217.09	1,121.12	(95.97)	20.00
27	MONSANTO CO NEW DEL COM	08/09/11	1,730.01	1,891.89	161.88	33.00
28	MERCK AND CO INC SHS	11/10/08	432.69	1,055.60	622.91	48.00
35	MERCK AND CO INC SHS	03/03/09	576.96	1,319.50	742.54	59.00
44	MERCK AND CO INC SHS	03/18/09	1,186.39	1,658.80	472.41	74.00
25	MERCK AND CO INC SHS	05/08/09	625.00	942.50	317.50	42.00
31	MERCK AND CO INC SHS	05/08/09	722.48	1,168.70	446.22	53.00
25	MERCK AND CO INC SHS	02/10/10	910.66	942.50	31.84	42.00
35	MERCK AND CO INC SHS	07/15/10	1,265.09	1,319.50	54.41	59.00
31	MERCK AND CO INC SHS	12/02/10	1,090.43	1,168.70	78.27	53.00
28	MICROSOFT CORP	08/05/08	717.51	726.88	9.37	23.00
84	MICROSOFT CORP	05/08/09	1,631.28	2,180.64	549.36	68.00
102	OCCIDENTAL PETE CORP CAL	08/05/08	7,672.24	9,557.40	1,885.16	188.00
-6	OCCIDENTAL PETE CORP CAL	02/09/09	350.82	562.20	211.38	12.00
35	OCCIDENTAL PETE CORP CAL	05/08/09	2,239.30	3,279.50	1,040.20	65.00

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CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
15	OCCIDENTAL PETE CORP CAL	07/15/10	1,212.30	1,405.50	193.20	28.00
27	PHILIP MORRIS INTL INC	08/05/08	1,465.83	2,118.96	653.13	84.00
6	PHILIP MORRIS INTL INC	02/09/09	221.52	470.88	249.36	19.00
13	PHILIP MORRIS INTL INC	05/08/09	534.43	1,020.24	485.81	41.00
10	PHILIP MORRIS INTL INC	07/15/10	496.30	784.80	288.50	31.00
1	PFIZER INC	01/19/10	19.92	21.64	1.72	1.00
90	PFIZER INC	02/16/10	1,595.91	1,947.60	351.69	80.00
55	PFIZER INC	07/15/10	809.41	1,190.20	380.79	49.00
152	PROGRESSIVE CRP OHIO	08/05/08	3,085.20	2,965.52	(119.68)	61.00
62	PROGRESSIVE CRP OHIO	02/09/09	803.57	1,209.62	406.05	25.00
115	PROGRESSIVE CRP OHIO	05/08/09	1,806.59	2,243.65	437.06	46.00
25	PROGRESSIVE CRP OHIO	07/15/10	501.41	487.75	(13.66)	10.00
108	SEALED AIR CORP (NEW)	08/05/08	2,394.31	1,858.68	(535.63)	57.00
28	SEALED AIR CORP (NEW)	02/09/09	388.84	481.88	93.04	15.00
55	SEALED AIR CORP (NEW)	05/08/09	1,126.40	946.55	(179.85)	29.00
56	SEALED AIR CORP (NEW)	07/15/10	1,209.08	963.76	(245.32)	30.00
40	TRANSATLANTIC HLDGS INC	08/05/08	2,340.81	2,189.20	(151.61)	36.00





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CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
10	TRANSATLANTIC HLDGS INC	05/08/09	411.00	547.30	136.30	9.00
43	TEXAS INSTRUMENTS	08/05/08	1,058.12	1,251.73	193.61	30.00
45	TEXAS INSTRUMENTS	11/07/08	776.81	1,309.95	533.14	31.00
5	TEXAS INSTRUMENTS	04/02/09	83.00	145.55	62.55	4.00
81	TEXAS INSTRUMENTS	05/08/09	1,372.14	2,357.91	985.77	56.00
21	TRANSCOCEAN LTD	08/05/08	2,764.65	806.19	(1,958.46)	67.00
5	TRANSCOCEAN LTD	05/08/09	369.10	191.95	(177.15)	16.00
75	WELLS FARGO & CO NEW DEL	08/05/08	2,299.47	2,067.00	(232.47)	36.00
95	WELLS FARGO & CO NEW DEL	01/26/09	1,575.94	2,618.20	1,042.26	46.00
25	WELLS FARGO & CO NEW DEL	02/09/09	477.20	689.00	211.80	12.00
70	WELLS FARGO & CO NEW DEL	03/06/09	609.12	1,929.20	1,320.08	34.00
57	WELLS FARGO & CO NEW DEL	05/08/09	1,407.33	1,570.92	163.59	28.00
145	WELLS FARGO & CO NEW DEL	07/15/10	-3,942.04	3,996.20	54.16	70.00
58	WELLS FARGO & CO NEW DEL	08/11/11	1,371.56	1,598.48	226.92	28.00
Total Equities			207,419.81 ✓	240,778.23	33,358.42	4,447.00

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CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Accrued Interest	Est Annual Income
Cash and Money Funds							
	CASH		66.66	66.66			
3,210	ML BANK DEPOSIT PROGRAM	01/31/11	3,210.00	3,210.00			4.81
5,042	BIF MONEY FUND		5,042.00	5,042.00			0.50
	Total Cash and Money Funds		8,318.66 ✓	8,318.66			5.31

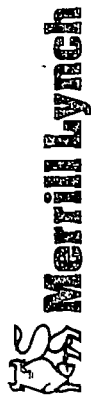
CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
46	ABBOTT LABS	08/05/08	2,673.07	2,586.58	(86.49)	89.00
21	ABBOTT LABS	05/08/09	947.72	1,180.83	233.11	41.00
38	ABBOTT LABS	07/15/10	1,820.83	2,136.74	315.91	73.00
15	AIR PRODUCTS&CHEM	10/27/10	1,267.56	1,277.85	10.29	35.00
14	AIR PRODUCTS&CHEM	05/26/11	1,296.15	1,192.66	(103.49)	33.00
2	AIR PRODUCTS&CHEM	05/27/11	187.07	170.38	(16.69)	5.00
102	ALTRIA GROUP INC	08/05/08	2,133.85	3,024.30	890.45	168.00
35	ALTRIA GROUP INC	02/09/09	586.20	1,037.75	451.55	58.00

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CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
60	ALTRIA GROUP INC	05/08/09	1,025.33	1,779.00	753.67	99.00
9	ALTRIA GROUP INC	06/04/09	152.69	266.85	114.16	15.00
9	ALTRIA GROUP INC	07/15/10	192.84	266.85	74.01	15.00
20	ARCOS DORADOS HOLDNG INC CL A SHARES	05/26/11	449.76	410.60	(39.16)	4.00
24	ARCOS DORADOS HOLDNG INC CL A SHARES	05/27/11	552.88	492.72	(60.16)	5.00
22	ARCOS DORADOS HOLDNG INC CL A SHARES	05/31/11	508.24	451.66	(56.58)	4.00
16	AMER EXPRESS COMPANY	08/05/08	611.68	754.72	143.04	12.00
9	AMER EXPRESS COMPANY	02/09/09	158.76	424.53	265.77	7.00
23	APACHE CORP	07/08/11	2,868.86	2,083.34	(785.52)	14.00
4	APPLE INC	08/05/08	629.88	1,620.00	990.12	
11	APPLE INC	10/27/08	1,055.64	4,455.00	3,399.36	
5	APPLE INC	05/08/09	637.75	2,025.00	1,387.25	
12	APPLE INC	06/03/09	1,673.06	4,860.00	3,186.94	
2	APPLE INC	05/26/11	669.54	810.00	140.46	
35	AUTOMATIC DATA PROC	08/05/08	1,533.01	1,890.35	357.34	56.00

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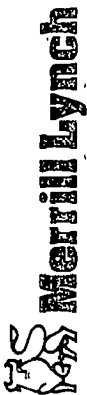
Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
10	AUTOMATIC DATA PROC	05/08/09	366.80	540.10	173.30	16.00
10	AUTOMATIC DATA PROC	07/15/10	414.40	540.10	125.70	16.00
4	BLACKROCK INC	09/01/11	652.26	712.96	60.70	22.00
4	BLACKROCK INC	09/02/11	637.25	712.96	75.71	22.00
13	BECTON DICKINSON CO	06/03/09	894.06	971.36	77.30	24.00
5	BECTON DICKINSON CO	07/14/09	348.20	373.60	25.40	9.00
7	BECTON DICKINSON CO	07/15/10	483.63	523.04	39.41	13.00
61	CHEVRON CORP	08/05/08	5,017.19	6,490.40	1,473.21	198.00
13	CHEVRON CORP	05/08/09	912.46	1,383.20	470.74	43.00
5	CHEVRON CORP	11/25/09	398.30	532.00	133.70	17.00
15	CHEVRON CORP	07/15/10	1,085.52	1,596.00	510.48	49.00
11	CHEVRON CORP	05/26/11	1,131.45	1,170.40	38.95	36.00
58	CONOCOPHILLIPS	08/05/08	4,605.18	4,226.46	(378.72)	154.00
5	CONOCOPHILLIPS	02/09/09	244.74	364.35	119.61	14.00
17	CONOCOPHILLIPS	05/07/09	754.47	1,238.79	484.32	45.00
32	CONOCOPHILLIPS	05/08/09	1,477.74	2,331.84	854.10	85.00
19	CONOCOPHILLIPS	07/15/10	994.76	1,384.53	389.77	51.00

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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
20	CATERPILLAR INC DEL	08/05/08	1,355.20	1,812.00	456.80	37.00
5	CATERPILLAR INC DEL	02/09/09	165.39	453.00	287.61	10.00
18	CATERPILLAR INC DEL	05/08/09	713.33	1,630.80	917.47	34.00
13	CATERPILLAR INC DEL	05/24/11	1,325.74	1,177.80	(147.94)	24.00
82	COCA COLA COM	08/05/08	4,476.23	5,737.54	1,261.31	155.00
12	COCA COLA COM	02/09/09	508.59	839.64	331.05	23.00
43	COCA COLA COM	05/08/09	1,840.81	3,008.71	1,167.90	81.00
6	COCA COLA COM	06/03/09	295.10	419.82	124.72	12.00
27	COCA COLA COM	07/15/10	1,424.43	1,889.19	464.76	51.00
47	DISNEY (WALT) CO COM STK	03/12/10	1,581.31	1,762.50	181.19	29.00
18	DISNEY (WALT) CO COM STK	03/02/11	781.12	675.00	(106.12)	11.00
100	EXXON MOBIL CORP COM	08/05/08	7,764.96	8,476.00	711.04	188.00
46	EXXON MOBIL CORP COM	05/08/09	3,252.18	3,898.96	646.78	87.00
12	EXXON MOBIL CORP COM	08/04/09	844.60	1,017.12	172.52	23.00
14	EXXON MOBIL CORP COM	02/22/10	918.55	1,186.64	268.09	27.00
61	EXXON MOBIL CORP COM	07/15/10	3,589.03	5,170.36	1,581.33	115.00
48	FREEMT-MCMRAN CPR & GLD	11/27/09	2,007.75	1,765.92	(241.83)	48.00

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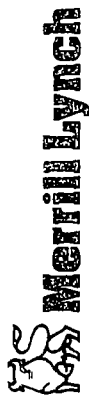


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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
24	FREERT-MCMRAN CPR & GLD	07/15/10	748.42	882.96	134.54	24.00
9	FREERT-MCMRAN CPR & GLD	02/28/11	471.43	331.11	(140.32)	9.00
18	FREERT-MCMRAN CPR & GLD	05/26/11	901.82	662.22	(239.60)	18.00
11	FRANKLIN RES INC	08/05/08	1,132.56	1,056.66	(75.90)	12.00
3	FRANKLIN RES INC	05/08/09	187.17	288.18	101.01	4.00
4	FRANKLIN RES INC	07/15/10	369.68	384.24	14.56	5.00
5	FRANKLIN RES INC	01/25/11	595.60	480.30	(115.30)	6.00
10	GREEN MOUNTN COFFEE ROS	11/04/11	706.32	448.50	(257.82)	
10	GREEN MOUNTN COFFEE ROS	11/07/11	691.51	448.50	(243.01)	
14	GENL DYNAMICS CORP COM	08/05/08	1,261.97	929.74	(332.23)	27.00
5	GENL DYNAMICS CORP COM	02/09/09	283.75	332.05	48.30	10.00
11	GENL DYNAMICS CORP COM	05/08/09	602.36	730.51	128.15	21.00
7	GENL DYNAMICS CORP COM	07/15/10	427.07	464.87	37.80	14.00
146	GENERAL ELECTRIC	08/05/08	4,231.09	2,614.86	(1,616.23)	100.00
31	GENERAL ELECTRIC	05/08/09	446.63	555.21	108.58	22.00
45	GENERAL ELECTRIC	07/15/10	674.02	805.95	131.93	31.00
26	HSBC HLDG PLC SP ADR	08/05/08	2,169.44	990.60	(1,178.84)	51.00





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EMATM Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
5	HSBC HLDG PLC SP ADR	02/09/09	207.67	190.50	(17.17)	10.00
18	HSBC HLDG PLC SP ADR	04/08/09	332.77	685.80	353.03	36.00
4	INTUITIVE SURGICAL INC NEW	08/05/08	1,219.88	1,852.04	632.16	
1	INTUITIVE SURGICAL INC NEW	02/09/09	114.88	463.01	348.13	
4	INTUITIVE SURGICAL INC NEW	03/08/11	1,329.11	1,852.04	522.93	
140	INTEL CORP	08/05/08	3,170.75	3,395.00	224.25	118.00
5	INTEL CORP	02/09/09	74.44	121.25	46.81	5.00
52	INTEL CORP	05/08/09	795.07	1,261.00	465.93	44.00
20	INTEL CORP	07/15/10	428.56	485.00	56.44	17.00
27	INTL BUSINESS MACHINES CORP IBM	01/15/10	3,548.32	4,964.76	1,416.44	81.00
6	INTL BUSINESS MACHINES CORP IBM	03/12/10	766.22	1,103.28	337.06	18.00
2	INTL BUSINESS MACHINES CORP IBM	07/15/10	260.14	367.76	107.62	6.00
32	JPMORGAN CHASE & CO	08/05/08	1,300.16	1,064.00	(236.16)	32.00
23	JPMORGAN CHASE & CO	01/13/09	581.71	764.75	183.04	23.00

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CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
4	JPMORGAN CHASE & CO	05/08/09	148.96	133.00	(15.96)	4.00
39	JPMORGAN CHASE & CO	06/02/09	1,359.66	1,296.75	(62.91)	39.00
15	JPMORGAN CHASE & CO	07/15/10	600.10	498.75	(101.35)	15.00
38	JPMORGAN CHASE & CO	01/24/11	1,709.75	1,263.50	(446.25)	38.00
48	JOHNSON AND JOHNSON COM	08/05/08	3,348.88	3,147.84	(201.04)	110.00
18	JOHNSON AND JOHNSON COM	03/31/09	947.79	1,180.44	232.65	42.00
34	JOHNSON AND JOHNSON COM	05/08/09	1,882.91	2,229.72	346.81	78.00
25	JOHNSON AND JOHNSON COM	07/15/10	1,503.16	1,639.50	136.34	57.00
27	KRAFT FOODS INC VA CL A	10/22/10	860.48	1,008.72	148.24	32.00
52	KRAFT FOODS INC VA CL A	10/25/10	1,678.09	1,942.72	264.63	61.00
22	LAUDER ESTEE COS INC A	08/05/08	1,027.18	2,471.04	1,443.86	24.00
5	LAUDER ESTEE COS INC A	02/09/09	143.04	561.60	418.56	6.00
12	LAUDER ESTEE COS INC A	05/08/09	407.94	1,347.84	939.90	13.00
46	MERCK AND CO INC SHS	08/05/08	1,569.97	1,734.20	164.23	78.00
31	MERCK AND CO INC SHS	05/08/09	773.06	1,168.70	395.64	53.00
17	MERCK AND CO INC SHS	07/01/09	478.22	640.90	162.68	29.00
21	MCDONALDS CORP COM	08/05/08	1,298.22	2,106.93	808.71	59.00

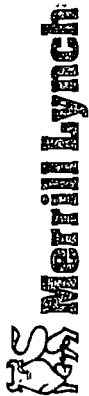
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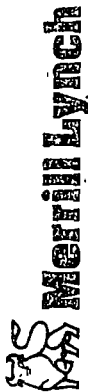
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Equities						
13	MCDONALDS CORP COM	02/09/09	771.42	1,304.29	532.87	37.00
21	MCDONALDS CORP COM	05/08/09	1,157.30	2,106.93	949.63	59.00
18	MCDONALDS CORP COM	06/03/09	1,094.29	1,805.94	711.65	51.00
24	MCDONALDS CORP COM	11/24/09	1,538.50	2,407.92	869.42	68.00
56	MC GRAW HILL COMPANIES	08/05/08	2,391.74	2,518.32	126.58	56.00
19	MC GRAW HILL COMPANIES	07/15/10	575.82	854.43	278.61	19.00
19	MEDTRONIC INC COM	08/05/08	1,013.47	726.75	(286.72)	19.00
5	MEDTRONIC INC COM	02/09/09	165.45	191.25	25.80	5.00
12	MEDTRONIC INC COM	05/08/09	413.15	459.00	45.85	12.00
9	MEDTRONIC INC COM	07/15/10	340.62	344.25	3.63	9.00
59	NEWS CORP CL A	08/05/08	844.88	1,052.56	207.68	12.00
30	NEWS CORP CL A	02/09/09	200.99	535.20	334.21	6.00
72	NEWS CORP CL A	05/08/09	685.31	1,284.48	599.17	14.00
64	NESTLE S A REP RG SH ADR	08/05/08	2,841.61	3,693.44	851.83	114.00
23	NESTLE S A REP RG SH ADR	02/09/09	761.30	1,327.33	566.03	41.00
33	NESTLE S A REP RG SH ADR	05/08/09	1,163.25	1,904.43	741.18	59.00
8	NESTLE S A REP RG SH ADR	11/27/09	384.23	461.68	77.45	15.00

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Equities						
7	NESTLE S A REP RG SH ADR	07/15/10	358.68	403.97	45.29	13.00
23	NOVO NORDISK A S ADR	08/05/08	1,479.37	2,650.98	1,171.61	32.00
19	NOVO NORDISK A S ADR	05/08/09	926.44	2,189.94	1,263.50	26.00
17	OCCIDENTAL PETE CORP CAL	08/05/08	1,268.89	1,592.90	324.01	32.00
6	OCCIDENTAL PETE CORP CAL	02/09/09	350.28	562.20	211.92	12.00
17	OCCIDENTAL PETE CORP CAL	05/08/09	1,105.03	1,592.90	487.87	32.00
10	OCCIDENTAL PETE CORP CAL	11/25/09	834.08	937.00	102.92	19.00
6	OCCIDENTAL PETE CORP CAL	07/15/10	486.18	562.20	76.02	12.00
13	OCCIDENTAL PETE CORP CAL	05/26/11	1,349.51	1,218.10	(131.41)	24.00
11	OCCIDENTAL PETE CORP CAL	09/01/11	947.38	1,030.70	83.32	21.00
78	PHILIP MORRIS INTL INC	08/05/08	4,266.97	6,121.44	1,854.47	241.00
41	PHILIP MORRIS INTL INC	01/13/09	1,740.88	3,217.68	1,476.80	127.00
37	PHILIP MORRIS INTL INC	02/09/09	1,365.90	2,903.76	1,537.86	114.00
49	PHILIP MORRIS INTL INC	05/08/09	2,001.14	3,845.52	1,844.38	151.00
26	PHILIP MORRIS INTL INC	07/15/10	1,298.61	2,040.48	741.87	81.00
45	PEPSICO INC	08/05/08	3,060.37	2,985.75	(74.62)	93.00
29	PEPSICO INC	05/08/09	1,436.07	1,924.15	488.08	60.00

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Equities						
8	PEPSICO INC	07/15/10	506.76	530.80	24.04	17.00
19	PRAXAIR INC	08/05/08	1,707.92	2,031.10	323.18	38.00
5	PRAXAIR INC	02/09/09	349.99	534.50	184.51	10.00
10	PRAXAIR INC	05/08/09	728.47	1,069.00	340.53	20.00
4	PRAXAIR INC	11/24/09	331.57	427.60	96.03	8.00
4	PRAXAIR INC	07/15/10	327.66	427.60	99.94	8.00
70	PROCTER & GAMBLE CO	08/05/08	4,743.72	4,669.70	(74.02)	147.00
26	PROCTER & GAMBLE CO	05/08/09	1,344.13	1,734.46	390.33	55.00
14	PROCTER & GAMBLE CO	07/15/10	877.74	933.94	56.20	30.00
26	QUALCOMM INC	08/05/08	1,424.28	1,422.20	(2.08)	23.00
5	QUALCOMM INC	02/09/09	183.25	273.50	90.25	5.00
17	QUALCOMM INC	05/08/09	704.78	929.90	225.12	15.00
30	QUALCOMM INC	07/15/10	1,098.23	1,641.00	542.77	26.00
27	RIO TINTO PLC SPNSRD ADR	10/22/10	1,736.25	1,320.84	(415.41)	32.00
12	RIO TINTO PLC SPNSRD ADR	10/25/10	798.79	587.04	(211.75)	15.00
9	RIO TINTO PLC SPNSRD ADR	03/01/11	628.92	440.28	(188.64)	11.00
12	RIO TINTO PLC SPNSRD ADR	03/02/11	835.60	587.04	(248.56)	15.00

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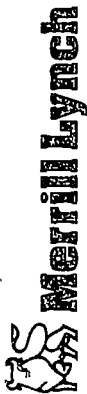
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CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
32	ROYAL DUTCH SHELL PLC SPONS ADR A	08/05/08	2,211.21	2,338.88	127.67	92.00
21	ROYAL DUTCH SHELL PLC SPONS ADR A	10/27/08	970.38	1,534.89	564.51	60.00
6	ROYAL DUTCH SHELL PLC SPONS ADR A	03/31/09	268.04	438.54	170.50	18.00
20	ROYAL DUTCH SHELL PLC SPONS ADR A	05/08/09	986.00	1,461.80	475.80	58.00
14	ROYAL DUTCH SHELL PLC SPONS ADR A	07/15/10	775.04	1,023.26	248.22	40.00
1	ROYAL DUTCH SHELL PLC SPONS ADR A	03/25/11	69.80	73.09	3.29	3.00
9	ROYAL DUTCH SHELL PLC SPONS ADR A	05/26/11	630.53	657.81	27.28	26.00
23	ROCHE HLDG LTD SPN ADR	01/19/10	1,036.11	978.65	(57.46)	26.00
24	ROCHE HLDG LTD SPN ADR	01/22/10	1,067.37	1,021.20	(46.17)	28.00
5	ROCHE HLDG LTD SPN ADR	01/26/10	219.88	212.75	(7.13)	6.00
18	ROCHE HLDG LTD SPN ADR	01/27/10	786.36	765.90	(20.46)	21.00
25	ROCHE HLDG LTD SPN ADR	07/15/10	904.00	1,063.75	159.75	29.00
32	TOTAL S.A SP ADR	08/05/08	2,351.37	1,635.52	(715.85)	87.00

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Equities						
17	TOTAL S.A. SP ADR	10/27/08	779.64	868.87	89.23	46.00
21	TOTAL S.A. SP ADR	05/08/09	1,171.11	1,073.31	(97.80)	57.00
9	TOTAL S.A. SP ADR	02/22/10	524.18	459.99	(64.19)	25.00
23	TOTAL S.A. SP ADR	07/15/10	1,147.66	1,175.53	27.87	62.00
15	TOTAL S.A. SP ADR	03/01/11	894.96	766.65	(128.31)	41.00
11	TOTAL S.A. SP ADR	06/01/11	621.37	562.21	(59.16)	30.00
12	TOTAL S.A. SP ADR	09/01/11	584.85	613.32	28.47	33.00
74	TEXAS INSTRUMENTS	08/05/08	1,823.33	2,154.14	330.81	51.00
5	TEXAS INSTRUMENTS	02/09/09	86.90	145.55	58.65	4.00
32	TEXAS INSTRUMENTS	05/08/09	545.90	931.52	385.62	22.00
20	TEXAS INSTRUMENTS	10/25/10	578.68	582.20	3.52	14.00
48	TARGET CORP COM	08/05/08	2,257.88	2,458.56	200.68	58.00
5	TARGET CORP COM	02/09/09	165.00	256.10	91.10	6.00
5	TARGET CORP COM	05/08/09	216.75	256.10	39.35	6.00
11	TARGET CORP COM	07/15/10	557.36	563.42	6.06	14.00
38	TARGET CORP COM	03/01/11	2,003.27	1,946.36	(56.91)	46.00

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Equities						
8	TIME WARNER CABLE INC SHS	09/01/11	524.03	508.56	(15.47)	16.00
13	TIME WARNER CABLE INC SHS	09/02/11	835.24	826.41	(8.83)	25.00
36	UNITED TECHS CORP COM	08/05/08	2,336.05	2,631.24	295.19	70.00
13	UNITED TECHS CORP COM	05/08/09	690.03	950.17	260.14	25.00
18	UNITED TECHS CORP COM	05/24/11	1,544.02	1,315.62	(228.40)	35.00
24	WAL-MART STORES INC	08/05/08	1,432.09	1,434.24	2.15	36.00
5	WAL-MART STORES INC	02/09/09	245.80	298.80	53.00	8.00
16	WAL-MART STORES INC	03/31/09	834.38	956.16	121.78	24.00
20	WAL-MART STORES INC	05/08/09	1,000.59	1,195.20	194.61	30.00
26	WAL-MART STORES INC	07/15/10	1,303.27	1,553.76	250.49	38.00
114	WALGREEN CO	08/05/08	4,005.96	3,768.84	(237.12)	103.00
40	WALGREEN CO	07/15/10	1,193.46	1,322.40	128.94	36.00
Total Equities			227,790.05	279,659.24	51,869.19	7,600.00

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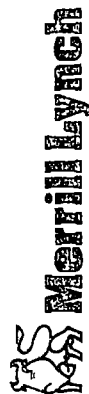
Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Accrued Interest	Est Annual Income
Cash and Money Funds							
	CASH		10.83	10.83			
5,292	ML BANK DEPOSIT PROGRAM	04/08/09	5,292.00	5,292.00			7.94
632	BIF MONEY FUND		632.00	632.00			0.06
	Total Cash and Money Funds		5,934.83 ✓	5,934.83			8.00

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
19	ASTRAZENECA PLC SPND ADR	03/09/09	576.39	879.51	303.12	52.00
7	ASTRAZENECA PLC SPND ADR	05/08/09	253.61	324.03	70.42	19.00
12	ASTRAZENECA PLC SPND ADR	05/22/09	499.21	555.48	56.27	33.00
9	ASTRAZENECA PLC SPND ADR	07/15/10	450.09	416.61	(33.48)	25.00
28	AMERICA MOVIL SAB DE CV ADR	07/09/09	534.18	632.80	98.62	8.00
6	AMERICA MOVIL SAB DE CV ADR	07/15/10	148.35	135.60	(12.75)	2.00
44	AU OPTRONICS CORP ADR	08/06/08	507.83	190.08	(317.75)	4.00

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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
21	AU OPTRONICS CORP ADR	09/18/08	226.36	90.72	(135.64)	2.00
24	AU OPTRONICS CORP ADR	05/08/09	258.52	103.68	(154.84)	3.00
17	AU OPTRONICS CORP ADR	07/15/10	158.61	73.44	(85.17)	2.00
91	AUST NW Z B G ADR	07/24/09	1,259.76	1,894.62	634.86	129.00
18	AUST NW Z B G ADR	07/15/10	355.14	374.76	19.62	26.00
66	BANCO SANTANDER SA ADR	11/25/08	501.41	496.32	(5.09)	46.00
37	BANCO SANTANDER SA ADR	12/08/08	327.19	278.24	(48.95)	26.00
23	BANCO SANTANDER SA ADR	02/02/09	173.05	172.96	(0.09)	16.00
32	BANCO SANTANDER SA ADR	03/20/09	220.31	240.64	20.33	23.00
62	BANCO SANTANDER SA ADR	05/08/09	620.00	466.24	(153.76)	43.00
46	BANCO SANTANDER SA ADR	07/15/10	585.12	345.92	(239.20)	32.00
106	BARCLAYS PLC ADR	07/06/10	1,741.46	1,164.94	(576.52)	38.00
22	BARCLAYS PLC ADR	07/15/10	407.44	241.78	(165.66)	8.00
40	BARCLAYS PLC ADR	03/24/11	758.48	439.60	(318.88)	15.00
5	BARCLAYS PLC ADR	03/25/11	93.57	54.95	(38.62)	2.00
35	BNP PARIBAS SPONSORD ADR	05/19/10	1,001.56	687.75	(313.81)	39.00
10	BNP PARIBAS SPONSORD ADR	07/15/10	316.40	196.50	(119.90)	12.00

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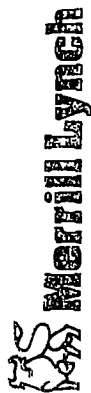
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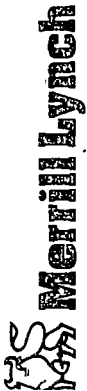
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Equities						
22	BNP PARIBAS SPONSORD ADR	06/01/11	861.12	432.30	(428.82)	25.00
16	BNP PARIBAS SPONSORD ADR	06/17/11	599.13	314.40	(284.73)	18.00
12	BHP BILLITON LTD ADR	09/25/08	743.14	847.56	104.42	25.00
10	BHP BILLITON LTD ADR	10/08/08	404.14	706.30	302.16	21.00
19	BHP BILLITON LTD ADR	02/04/09	370.22	635.67	265.45	19.00
12	BHP BILLITON LTD ADR	05/08/09	646.92	847.56	200.64	25.00
9	BHP BILLITON LTD ADR	07/15/10	599.22	635.67	36.45	19.00
40	COMPANHIA ENERG DE ADR	06/30/11	828.29	711.60	(116.69)	38.00
31	CHINA MOBILE LTD SPN ADR	03/10/11	1,482.29	1,503.19	20.90	57.00
97	CIE GENERALE DES ETABLISSEMENTS MICHELIN	08/17/11	1,453.48	1,136.84	(316.64)	37.00
53	CIE GENERALE DES ETABLISSEMENTS MICHELIN	11/16/11	667.44	621.16	(46.28)	20.00
104	CHINA MINSHENG UNSP ADR	07/05/11	981.28	895.44	(85.84)	
7	CHEUNG KONG HLDG ADR	08/06/08	98.35	82.81	(15.54)	3.00
41	CHEUNG KONG HLDG ADR	01/22/09	370.21	485.03	114.82	15.00
35	CHEUNG KONG HLDG ADR	05/08/09	392.00	414.05	22.05	13.00
22	CHEUNG KONG HLDG ADR	06/09/10	247.62	260.26	12.64	8.00

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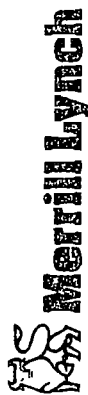


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Equities						
27	CHEUNG KONG HLDG ADR	07/15/10	316.71	319.41	2.70	10.00
103	DANSKE BK A/S UNSPNS ADR	01/03/11	1,343.04	648.90	(694.14)	
88	DANSKE BK A/S UNSPNS ADR	01/04/11	1,155.75	554.40	(601.35)	
81	DANSKE BK A/S UNSPNS ADR	04/20/11	953.40	510.30	(443.10)	
125	DEUTSCHE LUFT AG SPN ADR	07/07/11	2,754.63	1,472.50	(1,282.13)	80.00
19	ENI S P A SPONSORED ADR	08/06/08	1,239.56	784.13	(455.43)	39.00
7	ENI S P A SPONSORED ADR	12/09/08	321.17	288.89	(32.28)	15.00
11	ENI S P A SPONSORED ADR	05/08/09	518.32	453.97	(64.35)	23.00
4	ENI S P A SPONSORED ADR	05/13/09	191.09	165.08	(26.01)	9.00
7	ENI S P A SPONSORED ADR	06/09/10	254.40	288.89	34.49	15.00
12	ENI S P A SPONSORED ADR	07/15/10	481.44	495.24	13.80	25.00
11	ENCANA CORP	08/06/08	392.13	203.83	(188.30)	9.00
9	ENCANA CORP	10/09/08	203.99	166.77	(37.22)	8.00
7	ENCANA CORP	05/08/09	200.00	129.71	(70.29)	6.00
21	ENCANA CORP	11/19/09	575.78	389.13	(186.65)	17.00
11	ENCANA CORP	07/15/10	358.82	203.83	(154.99)	9.00
47	EAST JAPAN RY CO ADR	04/08/09	408.86	491.15	82.29	9.00

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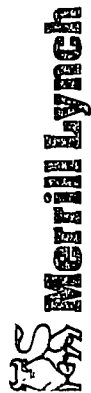
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CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
12	EAST JAPAN RY CO ADR	04/24/09	109.07	125.40	16.33	3.00
20	EAST JAPAN RY CO ADR	05/08/09	191.00	209.00	18.00	4.00
53	EAST JAPAN RY CO ADR	08/10/09	514.83	553.85	39.02	11.00
28	EAST JAPAN RY CO ADR	07/15/10	308.00	292.60	(15.40)	6.00
165	EURASIAN NATURAL RESOURCES CORP P	11/11/11	910.64	768.90	(141.74)	25.00
63	FUJIFILM HLDGS CORP ADR	08/06/08	1,884.97	1,465.38	(419.59)	19.00
24	FUJIFILM HLDGS CORP ADR	05/08/09	616.80	558.24	(58.56)	8.00
18	FUJIFILM HLDGS CORP ADR	07/15/10	558.00	418.68	(139.32)	6.00
28	FUJIFILM HLDGS CORP ADR	07/29/10	875.28	651.28	(224.00)	9.00
415	FINMECCANICA SPA SHS	05/05/11	2,762.99	738.70	(2,024.29)	80.00
33	GLAXOSMITHKLINE PLC ADR	08/06/08	1,606.12	1,505.79	(100.33)	73.00
11	GLAXOSMITHKLINE PLC ADR	10/15/08	406.70	501.93	95.23	25.00
17	GLAXOSMITHKLINE PLC ADR	05/08/09	525.81	775.71	249.90	38.00
13	GLAXOSMITHKLINE PLC ADR	07/15/10	480.48	593.19	112.71	29.00
6	GAZPROM SPON ADR	05/08/09	64.80	64.09	(0.71)	2.00
20	GAZPROM SPON ADR	06/11/09	234.50	213.62	(20.88)	5.00

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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
18	0AO GAZPROM SPON ADR	07/15/10	185.94	192.26	6.32	4.00
355	HENDERSON LD SP5D ADR	08/02/10	2,266.64	1,739.50	(527.14)	37.00
24	HOLCIM LTD SHS	04/08/09	174.20	254.40	80.20	8.00
36	HOLCIM LTD SHS	05/12/09	348.27	381.60	33.33	11.00
33	HOLCIM LTD SHS	07/28/09	369.44	349.80	(19.64)	11.00
29	HOLCIM LTD SHS	07/15/10	387.15	307.40	(79.75)	9.00
38	HOLCIM LTD SHS	06/17/11	561.25	402.80	(158.45)	12.00
2	IMPERIAL TOB GRP SPS ADR	04/17/09	90.73	150.68	59.95	7.00
6	IMPERIAL TOB GRP SPS ADR	04/24/09	274.69	452.04	177.35	19.00
8	IMPERIAL TOB GRP SPS ADR	05/06/09	373.81	602.72	228.91	25.00
11	IMPERIAL TOB GRP SPS ADR	05/08/09	530.75	828.74	297.99	34.00
11	IMPERIAL TOB GRP SPS ADR	07/08/09	566.52	828.74	262.22	34.00
7	IMPERIAL TOB GRP SPS ADR	12/04/09	436.70	527.38	90.68	22.00
5	IMPERIAL TOB GRP SPS ADR	03/05/10	322.99	376.70	53.71	16.00
4	IMPERIAL TOB GRP SPS ADR	04/26/10	241.25	301.36	60.11	13.00
13	IMPERIAL TOB GRP SPS ADR	07/15/10	784.94	979.42	194.48	40.00
9	IMPERIAL TOB GRP SPS ADR	03/14/11	568.11	678.06	109.95	28.00

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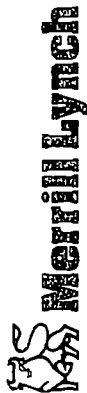
EMA Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
26	INTL POWER PLC SPON ADR	01/11/10	1,337.44	1,357.20	19.76	
12	INTL POWER PLC SPON ADR	05/12/10	572.43	626.40	53.97	
32	IBERDROLA S A ADR	09/18/09	1,288.03	771.20	(516.83)	46.00
20	IBERDROLA S A ADR	04/15/10	707.54	482.00	(225.54)	29.00
23	IBERDROLA S A ADR	05/13/10	674.48	554.30	(120.18)	33.00
15	IBERDROLA S A ADR	07/15/10	399.75	361.50	(38.25)	22.00
17	MITSUBISHI CP SPNSRD ADR	04/01/09	465.83	681.19	215.36	28.00
8	MITSUBISHI CP SPNSRD ADR	05/08/09	280.00	320.56	40.56	13.00
6	MITSUBISHI CP SPNSRD ADR	07/15/10	267.60	240.42	(27.18)	10.00
33	MITSUBISHI CP SPNSRD ADR	10/13/10	1,663.77	1,322.31	(341.46)	54.00
46	MACQUARIE GOURP LTD ADR	04/08/10	2,100.83	1,117.80	(983.03)	77.00
9	MACQUARIE GOURP LTD ADR	07/15/10	316.26	218.70	(97.56)	16.00
229	MITSUBISHI UFJ FINL GRP INC	08/06/08	1,898.19	959.51	(938.68)	32.00
60	MITSUBISHI UFJ FINL GRP INC	12/12/08	327.76	251.40	(76.36)	9.00
134	MITSUBISHI UFJ FINL GRP INC	05/08/09	878.69	561.46	(317.23)	19.00

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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
140	140 MITSUBISHI UFJ FINL GRP INC	10/02/09	700.53	586.60	(113.93)	20.00
113	113 MITSUBISHI UFJ FINL GRP INC	07/15/10	528.78	473.47	(55.31)	16.00
53	53 MUENCHENER RUECK-UNSPON	05/04/09	728.74	650.84	(77.90)	33.00
18	18 MUENCHENER RUECK-UNSPON	05/08/09	247.50	221.04	(26.46)	12.00
14	14 MUENCHENER RUECK-UNSPON	07/15/10	191.80	171.92	(19.88)	9.00
89	89 NISSAN MTR LTD SPN ADR	08/06/08	1,358.14	1,582.42	224.28	28.00
23	23 NISSAN MTR LTD SPN ADR	03/19/09	177.70	408.94	231.24	8.00
38	38 NISSAN MTR LTD SPN ADR	05/08/09	404.70	675.64	270.94	12.00
31	31 NISSAN MTR LTD SPN ADR	07/15/10	456.94	551.18	94.24	10.00
38	38 NIPPON TELG&TEL SPDN ADR	08/06/08	980.40	962.54	(17.86)	29.00
22	22 NIPPON TELG&TEL SPDN ADR	05/08/09	421.52	557.26	135.74	17.00
15	15 NIPPON TELG&TEL SPDN ADR	07/15/10	313.35	379.95	66.60	12.00
56	56 NTT DOCOMO INC SPD ADR	08/06/08	896.96	1,027.60	130.64	36.00
30	30 NTT DOCOMO INC SPD ADR	05/08/09	415.20	550.50	135.30	19.00
18	18 NTT DOCOMO INC SPD ADR	07/15/10	281.52	330.30	48.78	12.00
76	76 NEXEN INC CANADA COM	04/23/10	2,020.91	1,209.16	(811.75)	16.00





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EMATM Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
16	NEXEN INC CANADA COM	07/15/10	337.12	254.56	(82.56)	4.00
2	NATIONAL GRID PLC SP ADR	09/12/08	119.37	96.96	(22.41)	6.00
12	NATIONAL GRID PLC SP ADR	05/08/09	489.41	581.76	112.35	36.00
11	NATIONAL GRID PLC SP ADR	07/07/09	443.95	533.28	89.33	33.00
7	NATIONAL GRID PLC SP ADR	07/15/10	264.04	339.36	75.32	21.00
14	NATIONAL GRID PLC SP ADR	03/11/11	649.10	678.72	29.62	42.00
5	NATIONAL GRID PLC SP ADR	03/14/11	226.74	242.40	15.66	15.00
241	NIPPON YUSEN KABUSHIKI KAISHA SPON ADR	12/17/09	1,480.49	1,241.15	(239.34)	34.00
80	NIPPON YUSEN KABUSHIKI KAISHA SPON ADR	06/10/10	583.23	412.00	(171.23)	12.00
67	NIPPON YUSEN KABUSHIKI KAISHA SPON ADR	07/15/10	509.87	345.05	(164.82)	10.00
40	NITTO DENKO CORP ADR	12/10/10	1,787.44	1,421.20	(366.24)	43.00
11	PETROLEO BRAS VTG SPD ADR	08/06/08	560.12	273.35	(286.77)	2.00
6	PETROLEO BRAS VTG SPD ADR	09/25/08	288.71	149.10	(139.61)	1.00
5	PETROLEO BRAS VTG SPD ADR	05/08/09	199.60	124.25	(75.35)	1.00
9	PETROLEO BRAS VTG SPD ADR	02/04/10	353.30	223.65	(129.65)	2.00

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Equities						
7	PETROLEO BRAS VTG SPD ADR	07/15/10	246.33	173.95	(72.38)	2.00
22	PETROLEO BRAS VTG SPD ADR	04/21/11	841.51	546.70	(294.81)	4.00
5	POSCO SPN ADR	08/06/08	610.40	410.50	(199.90)	10.00
3	POSCO SPN ADR	03/12/09	182.08	246.30	64.22	6.00
3	POSCO SPN ADR	05/08/09	264.24	246.30	(17.94)	6.00
2	POSCO SPN ADR	07/15/10	200.68	164.20	(36.48)	4.00
99	PORSCHE AUTOMOBIL-UNSP ADR	09/16/09	766.81	519.75	(247.06)	6.00
72	PORSCHE AUTOMOBIL-UNSP ADR	11/10/09	565.49	378.00	(187.49)	4.00
126	PORSCHE AUTOMOBIL-UNSP ADR	04/07/10	781.80	661.50	(120.30)	7.00
89	PORSCHE AUTOMOBIL-UNSP ADR	06/09/10	348.87	467.25	118.38	5.00
93	PORSCHE AUTOMOBIL-UNSP ADR	07/15/10	445.47	488.25	42.78	5.00
150	PORSCHE AUTOMOBIL-UNSP ADR	04/27/11	1,035.23	787.50	(247.73)	8.00
6	ROYAL DUTCH SHEL PLC SPONS ADR B	10/15/08	279.01	456.06	177.05	21.00

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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
5	ROYAL DUTCH SHEL PLC SPONS ADR B	12/10/08	252.19	380.05	127.86	17.00
13	ROYAL DUTCH SHEL PLC SPONS ADR B	05/08/09	645.32	988.13	342.81	44.00
8	ROYAL DUTCH SHEL PLC SPONS ADR B	05/13/09	400.20	608.08	207.88	27.00
5	ROYAL DUTCH SHEL PLC SPONS ADR B	04/26/10	297.75	380.05	82.30	17.00
12	ROYAL DUTCH SHEL PLC SPONS ADR B	07/15/10	637.92	912.12	274.20	41.00
10	ROYAL DUTCH SHEL PLC SPONS ADR B	06/13/11	698.38	760.10	61.72	34.00
1	ROYAL DUTCH SHEL PLC SPONS ADR B	06/14/11	70.68	76.01	5.33	4.00
44	REPSOL YPF S A SPND ADR	08/06/08	1,394.36	1,342.44	(51.92)	54.00
14	REPSOL YPF S A SPND ADR	05/08/09	295.54	427.14	131.60	18.00
12	REPSOL YPF S A SPND ADR	07/15/10	274.80	366.12	91.32	15.00
26	SWISSCOM AG ADR	08/06/08	839.80	985.92	146.12	57.00
23	SWISSCOM AG ADR	10/16/08	646.53	872.16	225.63	51.00
23	SWISSCOM AG ADR	05/08/09	613.18	872.16	258.98	51.00

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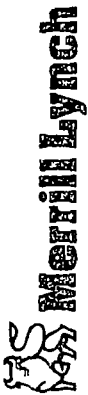
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EMASM Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
5	SWISSCOM AG ADR	11/17/09	190.25	189.60	(0.65)	11.00
11	SWISSCOM AG ADR	11/20/09	415.43	417.12	1.69	25.00
20	SWISSCOM AG ADR	07/15/10	753.80	758.40	4.60	44.00
37	STATOIL ASA SHS	08/06/08	1,083.36	947.57	(135.79)	37.00
12	STATOIL ASA SHS	05/08/09	266.16	307.32	41.16	12.00
10	STATOIL ASA SHS	07/15/10	206.30	256.10	49.80	10.00
54	SANOFI ADR	08/06/08	1,936.45	1,973.16	36.71	72.00
26	SANOFI ADR	05/08/09	783.12	950.04	166.92	35.00
19	SANOFI ADR	05/12/10	620.44	694.26	73.82	26.00
21	SANOFI ADR	07/15/10	659.19	767.34	108.15	28.00
40	STEINHOFF INTL-UNSPON ADR	07/01/11	686.06	567.20	(118.86)	15.00
2	SEVEN AND I HOLDINGS CO LTD SHS	04/08/09	90.04	110.50	20.46	3.00
5	SEVEN AND I HOLDINGS CO LTD SHS	05/08/09	232.40	276.25	43.85	7.00
21	SEVEN AND I HOLDINGS CO LTD SHS	02/03/10	934.06	1,160.25	226.19	28.00

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Equities						
6	SEVEN AND I HOLDINGS CO LTD SHS	07/15/10	283.14	331.50	48.36	8.00
17	SEVEN AND I HOLDINGS CO LTD SHS	04/20/11	854.90	939.25	84.35	23.00
124	SHIN-ETSU CHEM-UNSPON	12/09/10	1,577.08	1,522.72	(54.36)	34.00
82	SUMITOMO CHEMICAL CO-UNS	04/07/10	2,057.95	1,480.92	(577.03)	52.00
40	SUMITOMO CHEMICAL CO-UNS	04/26/10	960.59	722.40	(238.19)	26.00
25	SUMITOMO CHEMICAL CO-UNS	07/15/10	515.00	451.50	(63.50)	16.00
177	SALZGITTER AG SHS	04/06/10	1,674.83	870.84	(803.99)	5.00
54	SALZGITTER AG SHS	06/09/10	316.83	265.68	(51.15)	2.00
48	SALZGITTER AG SHS	07/15/10	305.28	236.16	(69.12)	2.00
266	SUNCORP GROUP LTD UNSP ADR	09/26/11	2,077.46	2,308.88	231.42	82.00
30	TOTAL S.A. SP ADR	08/06/08	2,202.00	1,533.30	(668.70)	81.00
3	TOTAL S.A. SP ADR	12/10/08	158.83	153.33	(5.50)	9.00
11	TOTAL S.A. SP ADR	05/08/09	617.32	562.21	(55.11)	30.00
3	TOTAL S.A. SP ADR	05/13/09	170.54	153.33	(17.21)	9.00
9	TOTAL S.A. SP ADR	07/15/10	447.75	459.99	12.24	25.00

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Equities						
139	TELSTRA CORP ADR	03/18/10	2,040.87	2,369.95	329.08	184.00
28	TELSTRA CORP ADR	07/15/10	404.04	477.40	73.36	37.00
22	TIGER BRANDS LTD ADR	07/01/11	649.98	678.70	28.72	22.00
84	TELEFONICA SA SPAIN ADR	06/17/10	1,679.02	1,443.96	(235.06)	144.00
18	TELEFONICA SA SPAIN ADR	07/15/10	380.28	309.42	(70.86)	31.00
18	TORONTO DOMINION BANK	05/20/09	796.20	1,346.58	550.38	49.00
4	TORONTO DOMINION BANK	03/05/10	275.00	299.24	24.24	11.00
4	TORONTO DOMINION BANK	07/15/10	275.52	299.24	23.72	11.00
10	TOYOTA MOTOR CORP ADR	12/01/10	796.35	661.30	(135.05)	12.00
20	TOYOTA MOTOR CORP ADR	12/02/10	1,579.01	1,322.60	(256.41)	24.00
45	UNILEVER NV NY REG SHS	08/06/08	1,255.06	1,546.65	291.59	48.00
26	UNILEVER NV NY REG SHS	05/08/09	590.98	893.62	302.64	28.00
15	UNILEVER NV NY REG SHS	07/15/10	449.10	515.55	66.45	16.00
23	VALE SA	06/29/11	726.23	493.35	(232.88)	1.00
3	VALE SA	06/30/11	95.28	64.35	(30.93)	1.00
229	VALLOUREC SA SPONSORED ADR NEW	10/14/11	3,070.48	2,960.97	(109.51)	59.00

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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
10	ZURICH FINL SVCS SPN ADR EST MKT PRICE AS OF 12/29/11	08/06/08	267.50	224.50	(43.00)	19.00
27	ZURICH FINL SVCS SPN ADR	10/15/08	560.16	606.15	45.99	50.00
41	ZURICH FINL SVCS SPN ADR	05/08/09	797.45	920.45	123.00	76.00
27	ZURICH FINL SVCS SPN ADR	07/13/09	457.05	606.15	149.10	50.00
14	ZURICH FINL SVCS SPN ADR	03/05/10	343.16	314.30	(28.86)	26.00
13	ZURICH FINL SVCS SPN ADR	06/09/10	268.04	291.85	23.81	24.00
35	ZURICH FINL SVCS SPN ADR	07/15/10	816.20	785.75	(30.45)	65.00
51	YARA INTL ASA SP ADR EST MKT PRICE AS OF 12/29/11	12/10/10	2,664.40	2,014.50	(649.90)	43.00
9	YARA INTL ASA SP ADR	12/13/10	472.01	355.50	(116.51)	8.00
24	YARA INTL ASA SP ADR	08/10/11	1,104.96	948.00	(156.96)	21.00
Total Equities			146,022.59	133,059.09	(12,963.50)	5,169.00

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Cash and Money Funds							
	CASH		4.34	4.34			
8,239	ML BANK DEPOSIT PROGRAM	06/01/10	8,239.00	8,239.00			12.36
135	BIF MONEY FUND		135.00	135.00			0.01
	Total Cash and Money Funds		8,378.34	8,378.34			12.37

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
28	ACUITY BRANDS INC	03/03/10	1,148.98	1,484.00	335.02	15.00
28	ACUITY BRANDS INC	07/12/10	1,087.07	1,484.00	396.93	15.00
8	ACUITY BRANDS INC	07/15/10	321.60	424.00	102.40	5.00
6	ACUITY BRANDS INC	05/02/11	351.35	318.00	(33.35)	4.00
35	AFFILIATED MANAGERS GRP	11/24/08	790.92	3,358.25	2,567.33	
23	AFFILIATED MANAGERS GRP	05/08/09	1,333.31	2,206.85	873.54	
16	AFFILIATED MANAGERS GRP	07/15/10	1,025.12	1,535.20	510.08	
14	AFFILIATED MANAGERS GRP	10/04/11	1,023.13	1,343.30	320.17	

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THE SUDER FOUNDATION



Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
21	A N S Y S INC COM	08/05/08	938.91	1,202.88	263.97	
15	A N S Y S INC COM	10/10/08	394.88	859.20	464.32	
5	A N S Y S INC COM	10/14/08	164.33	286.40	122.07	
10	A N S Y S INC COM	03/19/09	242.80	572.80	330.00	
35	A N S Y S INC COM	05/08/09	923.65	2,004.80	1,081.15	
13	A N S Y S INC COM	07/15/10	563.52	744.64	181.12	
22	AMETEK INC NEW	08/05/08	692.41	926.20	233.79	6.00
8	AMETEK INC NEW	08/15/08	259.01	336.80	77.79	2.00
30	AMETEK INC NEW	10/10/08	645.77	1,263.00	617.23	8.00
33	AMETEK INC NEW	05/08/09	724.68	1,389.30	664.62	8.00
12	AMETEK INC NEW	07/15/10	342.88	505.20	162.32	3.00
23	AMETEK INC NEW	10/04/11	742.90	968.30	225.40	6.00
1	AARON'S INC SHS A	03/24/09	15.66	26.68	11.02	1.00
21	AARON'S INC SHS A	05/08/09	445.20	560.28	115.08	2.00
33	AARON'S INC SHS A	06/18/10	657.41	880.44	223.03	2.00
60	AARON'S INC SHS A	07/15/10	1,046.83	1,600.80	553.97	4.00
46	APTARGROUP INC	08/05/08	1,777.45	2,399.82	622.37	41.00

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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
5	APTARGROUP INC	03/24/09	153.61	260.85	107.24	5.00
21	APTARGROUP INC	05/08/09	654.78	1,095.57	440.79	19.00
13	APTARGROUP INC	07/15/10	525.59	678.21	152.62	12.00
10	BLACKBAUD INC	08/05/08	193.00	277.00	84.00	5.00
45	BLACKBAUD INC	10/07/08	712.91	1,246.50	533.59	22.00
15	BLACKBAUD INC	03/09/09	137.20	415.50	278.30	8.00
15	BLACKBAUD INC	03/11/09	150.61	415.50	264.89	8.00
35	BLACKBAUD INC	05/08/09	530.95	969.50	438.55	17.00
32	BLACKBAUD INC	05/03/10	760.66	886.40	125.74	16.00
17	BLACKBAUD INC	07/15/10	388.79	470.90	82.11	9.00
25	BIO RAD LABS CL A	08/05/08	2,302.50	2,401.00	98.50	
11	BIO RAD LABS CL A	05/08/09	826.43	1,056.44	230.01	
7	BIO RAD LABS CL A	07/15/10	624.05	672.28	48.23	
7	BIO RAD LABS CL A	08/16/11	709.09	672.28	(36.81)	
6	COPART INC COM	08/05/08	266.28	287.34	21.06	
10	COPART INC COM	11/24/08	265.48	478.90	213.42	
10	COPART INC COM	12/11/08	260.79	478.90	218.11	

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Equities						
5	COPART INC COM	12/30/08	130.74	239.45	108.71	
15	COPART INC COM	05/08/09	470.55	718.35	247.80	
10	COLUMBIA SPORTSWEAR CO	08/26/09	383.54	465.50	81.96	9.00
10	COLUMBIA SPORTSWEAR CO	08/27/09	386.12	465.50	79.38	9.00
8	COLUMBIA SPORTSWEAR CO	01/20/10	335.23	372.40	37.17	8.00
9	COLUMBIA SPORTSWEAR CO	07/15/10	417.33	418.95	1.62	8.00
15	CARLISLE COS INC	08/12/09	488.78	664.50	175.72	11.00
16	CARLISLE COS INC	08/13/09	527.82	708.80	180.98	12.00
21	CARLISLE COS INC	09/24/09	709.35	930.30	220.95	16.00
12	CARLISLE COS INC	10/20/09	401.00	531.60	130.60	9.00
10	CARLISLE COS INC	04/29/10	389.76	443.00	53.24	8.00
8	CARLISLE COS INC	07/15/10	298.87	354.40	55.53	6.00
27	CARLISLE COS INC	08/16/11	1,013.42	1,196.10	182.68	20.00
5	CARMAX INC	12/17/08	39.39	152.40	113.01	
20	CARMAX INC	12/18/08	163.74	609.60	445.86	
35	CARMAX INC	05/08/09	428.40	1,066.80	638.40	
31	CARMAX INC	07/15/10	603.26	944.88	341.62	

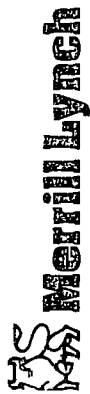
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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
20	CHURCH&DWIGHT CO INC	09/16/08	629.75	915.20	285.45	14.00
20	CHURCH&DWIGHT CO INC	03/12/09	477.42	915.20	437.78	14.00
16	CHURCH&DWIGHT CO INC	05/08/09	430.32	732.16	301.84	11.00
20	CHURCH&DWIGHT CO INC	06/11/09	512.37	915.20	402.83	14.00
26	CHURCH&DWIGHT CO INC	03/01/11	972.06	1,189.76	217.70	18.00
5	CITY NATIONAL CORP	08/05/08	252.35	220.90	(31.45)	4.00
15	CITY NATIONAL CORP	03/09/09	355.03	662.70	307.67	12.00
5	CITY NATIONAL CORP	03/23/09	163.81	220.90	57.09	4.00
6	CITY NATIONAL CORP	05/08/09	259.56	265.08	5.52	5.00
15	CITY NATIONAL CORP	06/09/09	557.91	662.70	104.79	12.00
9	CITY NATIONAL CORP	07/15/10	487.89	397.62	(90.27)	8.00
26	CITY NATIONAL CORP	08/04/11	1,330.12	1,148.68	(181.44)	21.00
23	CITY NATIONAL CORP	10/04/11	814.14	1,016.14	202.00	19.00
12	CLARCOR INC	08/17/11	516.37	599.88	83.51	6.00
26	CLARCOR INC	08/18/11	1,062.93	1,299.74	236.81	13.00
8	CLARCOR INC	08/19/11	326.20	399.92	73.72	4.00
25	CULLEN FRST BKRS PV\$0.01	04/29/10	1,489.53	1,322.75	(166.78)	46.00



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Equities						
3	CULLEN FRST BKRS PV\$0.01	04/30/10	179.95	158.73	(21.22)	6.00
4	CULLEN FRST BKRS PV\$0.01	07/15/10	211.80	211.64	(0.16)	8.00
65	DENTSPLY INTL INC	08/05/08	2,561.00	2,274.35	(286.65)	15.00
20	DENTSPLY INTL INC	03/05/09	453.20	699.80	246.60	5.00
25	DENTSPLY INTL INC	05/08/09	741.75	874.75	133.00	6.00
21	DENTSPLY INTL INC	06/18/10	663.89	734.79	70.90	5.00
25	DENTSPLY INTL INC	07/15/10	754.25	874.75	120.50	6.00
19	DENTSPLY INTL INC	10/21/10	616.17	664.81	48.64	5.00
26	DRIL QUIP	04/29/10	1,674.49	1,711.32	36.83	
9	DRIL QUIP	07/15/10	434.70	592.38	157.68	
23	EQUIFAX INC	03/04/10	752.31	891.02	138.71	15.00
22	EQUIFAX INC	03/05/10	727.53	852.28	124.75	15.00
17	EQUIFAX INC	05/25/10	502.64	658.58	155.94	11.00
10	EQUIFAX INC	07/15/10	296.40	387.40	91.00	7.00
30	EQUIFAX INC	12/06/10	1,058.07	1,162.20	104.13	20.00
21	EQUIFAX INC	03/01/11	747.67	813.54	65.87	14.00
25	EQUIFAX INC	08/16/11	762.19	968.50	206.31	16.00

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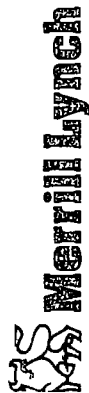
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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
47	FAIR ISAAC CORPORATION	08/05/08	1,047.49	1,684.48	636.99	4.00
29	FAIR ISAAC CORPORATION	05/08/09	495.32	1,039.36	544.04	3.00
11	FAIR ISAAC CORPORATION	08/12/09	242.08	394.24	152.16	1.00
20	FAIR ISAAC CORPORATION	07/15/10	474.40	716.80	242.40	2.00
34	FAIR ISAAC CORPORATION	10/04/11	709.29	1,218.56	509.27	3.00
23	FLIR SYSTEMS INC	06/15/09	555.68	576.61	20.93	6.00
27	FLIR SYSTEMS INC	06/16/09	629.89	676.89	47.00	7.00
15	FLIR SYSTEMS INC	07/20/09	345.72	376.05	30.33	4.00
22	FLIR SYSTEMS INC	07/24/09	476.84	551.54	74.70	6.00
2	FLIR SYSTEMS INC	09/15/10	54.84	50.14	(4.70)	1.00
40	FLIR SYSTEMS INC	09/16/10	1,088.87	1,002.80	(86.07)	10.00
52	FLIR SYSTEMS INC	07/28/11	1,430.63	1,303.64	(126.99)	13.00
25	FACTSET RESH SYS INC	08/05/08	1,468.01	2,182.00	713.99	27.00
5	FACTSET RESH SYS INC	09/16/08	265.84	436.40	170.56	6.00
4	FACTSET RESH SYS INC	05/08/09	211.56	349.12	137.56	5.00
14	FOREST CITY ENTRPRS CL A	05/08/09	115.92	165.48	49.56	
65	FOREST CITY ENTRPRS CL A	05/15/09	408.90	768.30	359.40	

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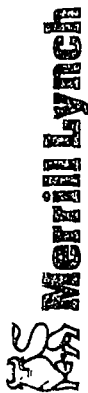
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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
21	FOREST CITY ENTRPRS CL A	08/12/09	162.78	248.22	85.44	15.00
50	FOREST CITY ENTRPRS CL A	08/13/09	388.70	591.00	202.30	22.00
98	FOREST CITY ENTRPRS CL A	07/15/10	1,199.52	1,158.36	(41.16)	19.00
30	GENTEX CORP	05/02/11	936.38	887.70	(48.68)	9.00
45	GENTEX CORP	05/03/11	1,415.74	1,331.55	(84.19)	15.00
39	GENTEX CORP	06/28/11	1,157.65	1,154.01	(3.64)	41.00
18	GENTEX CORP	07/28/11	527.99	532.62	4.63	15.00
30	GENTEX CORP	08/16/11	750.48	887.70	137.22	15.00
45	GRACO INC	08/05/08	1,658.70	1,840.05	181.35	15.00
16	GRACO INC	05/08/09	389.76	654.24	264.48	7.00
7	GRACO INC	05/12/10	247.67	286.23	38.56	16.00
17	GRACO INC	07/15/10	515.44	695.13	179.69	41.00
65	HCC INS HOLDING INC	08/05/08	1,535.31	1,787.50	252.19	14.00
22	HCC INS HOLDING INC	05/08/09	528.22	605.00	76.78	9.00
14	HCC INS HOLDING INC	09/24/09	387.45	385.00	(2.45)	20.00
32	HCC INS HOLDING INC	12/15/09	858.46	880.00	21.54	10.00
15	HCC INS HOLDING INC	06/18/10	382.42	412.50	30.08	

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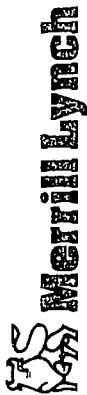
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Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
19	HCC INS HOLDING INC	07/15/10	484.12	522.50	38.38	12.00
18	HCC INS HOLDING INC	05/02/11	585.00	495.00	(90.00)	12.00
30	HCC INS HOLDING INC	05/03/11	972.90	825.00	(147.90)	19.00
18	HCC INS HOLDING INC	08/16/11	505.65	495.00	(10.65)	12.00
75	JACK HENRY & ASSOC INC	08/05/08	1,626.56	2,520.75	894.19	32.00
5	JACK HENRY & ASSOC INC	03/24/09	81.74	168.05	86.31	3.00
20	JACK HENRY & ASSOC INC	05/08/09	355.80	672.20	316.40	9.00
79	HUNT J B TRANS SVCS INC	12/13/10	3,153.40	3,560.53	407.13	42.00
7	HUNT J B TRANS SVCS INC	05/02/11	333.36	315.49	(17.87)	4.00
50	IDEX CORP DELAWARE COM	08/05/08	1,930.00	1,855.50	(74.50)	34.00
30	IDEX CORP DELAWARE COM	10/10/08	690.15	1,113.30	423.15	21.00
26	IDEX CORP DELAWARE COM	05/08/09	661.44	964.86	303.42	18.00
22	IDEX CORP DELAWARE COM	07/15/10	663.96	816.42	152.46	15.00
15	JACOBS ENGN GRP INC DELA	10/21/08	597.24	608.70	11.46	
10	JACOBS ENGN GRP INC DELA	10/28/08	296.61	405.80	109.19	
10	JACOBS ENGN GRP INC DELA	03/09/09	332.59	405.80	73.21	
14	JACOBS ENGN GRP INC DELA	05/08/09	595.98	568.12	(27.86)	

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Equities						
5	JACOBS ENGN GRP INC DELA	06/11/09	222.04	202.90	(19.14)	
13	JACOBS ENGN GRP INC DELA	08/13/09	578.84	527.54	(51.30)	
15	JACOBS ENGN GRP INC DELA	06/18/10	623.39	608.70	(14.69)	
20	JACOBS ENGN GRP INC DELA	07/15/10	749.40	811.60	62.20	
27	JACOBS ENGN GRP INC DELA	10/04/11	857.29	1,095.66	238.37	
16	KIRBY CORP COM	08/05/08	729.60	1,053.44	323.84	
15	KIRBY CORP COM	10/14/08	562.83	987.60	424.77	
10	KIRBY CORP COM	12/09/08	255.21	658.40	403.19	
28	KIRBY CORP COM	05/08/09	952.28	1,843.52	891.24	
20	KIRBY CORP COM	07/15/10	788.80	1,316.80	528.00	
80	LKQ CORP	08/05/08	1,612.80	2,406.40	793.60	
35	LKQ CORP	11/24/08	350.36	1,052.80	702.44	
44	LKQ CORP	05/08/09	733.48	1,323.52	590.04	
23	LKQ CORP	05/25/10	418.32	691.84	273.52	
19	LKQ CORP	05/26/10	348.83	571.52	222.69	
8	LKQ CORP	07/15/10	164.56	240.64	76.08	
45	LKQ CORP	08/16/11	1,063.74	1,353.60	289.86	

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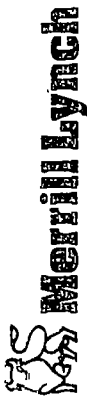
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Equities						
2	METTLER-TOLEDO INTL INC	10/07/08	171.64	295.42	123.78	
10	METTLER-TOLEDO INTL INC	03/19/09	494.08	1,477.10	983.02	
3	METTLER-TOLEDO INTL INC	07/15/10	354.39	443.13	88.74	
30	MORNINGSTAR INC	08/05/08	1,962.30	1,783.50	(178.80)	12.00
3	MORNINGSTAR INC	10/31/08	100.19	178.35	78.16	2.00
7	MORNINGSTAR INC	11/06/08	236.98	416.15	179.17	3.00
3	MORNINGSTAR INC	12/17/08	94.49	178.35	83.86	2.00
3	MORNINGSTAR INC	12/19/08	99.53	178.35	78.82	2.00
10	MORNINGSTAR INC	12/30/08	339.42	594.50	255.08	4.00
10	MORNINGSTAR INC	02/20/09	279.62	594.50	314.88	4.00
5	MORNINGSTAR INC	03/13/09	160.68	297.25	136.57	2.00
21	MORNINGSTAR INC	05/08/09	877.38	1,248.45	371.07	9.00
28	MORNINGSTAR INC	05/04/10	1,331.02	1,664.60	333.58	12.00
14	MORNINGSTAR INC	07/15/10	629.02	832.30	203.28	6.00
9	MARKEL CORP COM	08/05/08	3,345.66	3,732.03	386.37	
2	MARKEL CORP COM	12/11/08	604.21	829.34	225.13	
2	MARKEL CORP COM	03/03/09	499.80	829.34	329.54	

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Equities						
1	MARKEL CORP COM	03/19/09	244.53	414.67	170.14	
5	MARKEL CORP COM	05/08/09	1,390.00	2,073.35	683.35	
3	MARKEL CORP COM	07/15/10	1,052.49	1,244.01	191.52	
3	MARKEL CORP COM	10/21/10	1,040.16	1,244.01	203.85	
34	O'REILLY AUTOMOTIVE INC	11/13/09	1,351.15	2,718.30	1,367.15	
16	O'REILLY AUTOMOTIVE INC	01/14/10	-619.16	1,279.20	660.04	
9	O'REILLY AUTOMOTIVE INC	02/18/10	342.90	719.55	376.65	
22	O'REILLY AUTOMOTIVE INC	07/15/10	1,057.10	1,758.90	701.80	
20	O'REILLY AUTOMOTIVE INC	02/24/11	1,094.99	1,599.00	504.01	
40	OCEANEERING INTL INC	12/10/08	509.01	1,845.20	1,336.19	24.00
24	OCEANEERING INTL INC	06/18/10	571.41	1,107.12	535.71	15.00
18	OCEANEERING INTL INC	07/15/10	414.81	830.34	415.53	11.00
41	PALL CORP PV \$0.10	08/30/11	2,091.32	2,343.15	251.83	29.00
21	SEI INVT CO PA PV \$0.01	08/05/08	491.91	364.35	(127.56)	7.00
10	SEI INVT CO PA PV \$0.01	09/22/08	208.22	173.50	(34.72)	3.00
15	SEI INVT CO PA PV \$0.01	09/23/08	312.17	260.25	(51.92)	5.00
8	SEI INVT CO PA PV \$0.01	09/29/08	149.48	138.80	(10.68)	3.00

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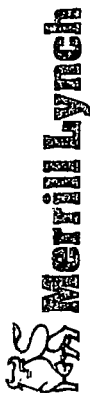
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Equities						
50	SEI INVT CO PA PV \$0.01	03/19/09	580.25	867.50	287.25	15.00
34	SEI INVT CO PA PV \$0.01	05/08/09	517.82	589.90	72.08	11.00
22	SEI INVT CO PA PV \$0.01	07/15/10	474.98	381.70	(93.28)	7.00
68	SEI INVT CO PA PV \$0.01	10/04/11	954.96	1,179.80	224.84	21.00
40	SCHEIN (HENRY) INC COM	08/05/08	2,272.00	2,577.20	305.20	
20	SCHEIN (HENRY) INC COM	12/18/08	703.01	1,288.60	585.59	
4 ³	SCHEIN (HENRY) INC COM	05/08/09	185.40	257.72	72.32	
13	SCHEIN (HENRY) INC COM	12/15/09	664.65	837.59	172.94	
8	SCHEIN (HENRY) INC COM	07/15/10	443.68	515.44	71.76	
42	THE SCOTTS MIRACLE GRO CO	05/02/11	2,372.26	1,960.98	(411.28)	51.00
24	THE SCOTTS MIRACLE GRO CO	06/21/11	1,224.96	1,120.56	(104.40)	29.00
10	THE SCOTTS MIRACLE GRO CO	07/28/11	511.82	466.90	(44.92)	12.00
145	SALLY BEAUTY HLDGS INC	08/05/08	1,123.61	3,063.85	1,940.24	
19	SALLY BEAUTY HLDGS INC	05/08/09	137.37	401.47	264.10	
35	SALLY BEAUTY HLDGS INC	07/15/10	301.35	739.55	438.20	

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THE SUDER FOUNDATION

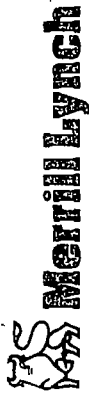
EMA Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
35	SALLY BEAUTY HLDGS INC	10/21/10	429.98	739.55	309.57	
20	SALLY BEAUTY HLDGS INC	07/28/11	345.95	422.60	76.65	
38	SOLERA HOLDINGS INC	08/04/11	2,053.19	1,692.52	(360.67)	16.00
95	UMPQUA HLDGS CORP ORE	05/12/10	1,322.22	1,177.05	(145.17)	27.00
21	UMPQUA HLDGS CORP ORE	05/13/10	293.34	260.19	(33.15)	6.00
33	UMPQUA HLDGS CORP ORE	07/12/10	401.00	408.87	7.87	10.00
21	UMPQUA HLDGS CORP ORE	07/15/10	260.61	260.19	(0.42)	6.00
53	UMPQUA HLDGS CORP ORE	10/21/10	606.32	656.67	50.35	15.00
27	UMPQUA HLDGS CORP ORE	10/22/10	307.04	334.53	27.49	8.00
35	UNIVERSAL HEALTH SVCS B	01/19/10	1,124.01	1,360.10	236.09	7.00
11	UNIVERSAL HEALTH SVCS B	07/15/10	412.06	427.46	15.40	3.00
2	VARIAN MEDICAL SYS INC	03/24/09	59.22	134.26	75.04	
6	VARIAN MEDICAL SYS INC	04/17/09	205.91	402.78	196.87	
12	VARIAN MEDICAL SYS INC	05/08/09	427.20	805.56	378.36	
10	VARIAN MEDICAL SYS INC	06/11/09	378.48	671.30	292.82	
12	VARIAN MEDICAL SYS INC	08/13/09	447.22	805.56	358.34	
4	VARIAN MEDICAL SYS INC	07/15/10	218.04	268.52	50.48	

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THE SUDER FOUNDATION



Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
16	VERISK ANALYTICS INC CLASS A	02/22/11	531.82	642.08	110.26	
46	VERISK ANALYTICS INC CLASS A	02/23/11	1,503.56	1,845.98	342.42	
4	VERISK ANALYTICS INC CLASS A	02/24/11	130.17	160.52	30.35	
22	VERISK ANALYTICS INC CLASS A	03/01/11	682.07	882.86	200.79	
17	VERISK ANALYTICS INC CLASS A	03/02/11	530.47	682.21	151.74	
9	WILEY JOHN & SONS CL A	10/01/08	360.18	399.60	39.42	8.00
6	WILEY JOHN & SONS CL A	10/02/08	240.02	266.40	26.38	5.00
10	WILEY JOHN & SONS CL A	10/03/08	399.20	444.00	44.80	8.00
3	WILEY JOHN & SONS CL A	10/16/08	95.81	133.20	37.39	3.00
7	WILEY JOHN & SONS CL A	10/21/08	236.77	310.80	74.03	6.00
5	WILEY JOHN & SONS CL A	03/24/09	153.85	222.00	68.15	4.00
20	WILEY JOHN & SONS CL A	05/08/09	683.00	888.00	205.00	16.00
12	WILEY JOHN & SONS CL A	09/24/09	406.01	532.80	126.79	10.00
12	WILEY JOHN & SONS CL A	07/15/10	485.88	532.80	46.92	10.00

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THE SUDER FOUNDATION



Fiscal Statement

CURRENT PORTFOLIO SUMMARY

Quantity	Security Description	Date Acquired	Total/Adj Cost Basis	Fiscal Year Value 12/31/11	Unrealized Gain or (Loss)	Est Annual Income
Equities						
15	WILEY JOHN & SONS CL A	10/27/10	632.38	666.00	33.62	12.00
12	WILEY JOHN & SONS CL A	10/28/10	509.70	532.80	23.10	10.00
4	WILEY JOHN & SONS CL A	08/04/11	197.47	177.60	(19.87)	4.00
23	WRIGHT EXPRESS CORP	08/08/11	964.81	1,247.75	282.94	-
22	WRIGHT EXPRESS CORP	08/09/11	901.02	1,193.50	292.48	-
Total Equities			161,953.10	214,554.56	52,601.46	1,817.00

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540-04064

02196318

X

00-17-6060B (R02-10)



**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

► **File a separate application for each return.**

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

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

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

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension — check this box and complete Part I only ☐

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

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	The Suder Foundation	☒ 26-3041654
	Number, street, and room or suite number. If a P.O. box, see instructions	Social security number (SSN)
	3701 E. Plano Parkway	☐
File by the due date for filing your return. See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	Plano, TX 75074	

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

04

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	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (section 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 ► Diane Schorr

Telephone No. ► 469-429-2200 FAX No. ► 866-363-7423

- 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 8/15, 20 12, to file the exempt organization return for the organization named above.

The extension is for the organization's return for

- ☒ calendar year 20 11 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	\$	828.
3b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	78.
3c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	750.

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.