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# Form **990**-PF

4.1 #

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

OMB No 1545 0052

2011

Department of the Treasury
Internal Revenue Service

Note. The found
For calendar year 2011, or tax year beginning

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

7	ARL	KIRBY ARNOLD JR CHARITABLE		and ending	A Employer identification num 42-6673691	nber
		89TH STREET DCK, TX 79424		I	B Telephone number (see the	instructions)
_		ck all that apply: Initial return	Initial Return of a form	mer public charity	C If exemption application is D 1 Foreign organizations, chec 2 Foreign organizations meet	k here
H	l CI	Address change   Address change   X Section 501	Name change (c)(3) exempt private for	oundation	here and attach computation	n est, clieck
7	[	Section 4947(a)(1) nonexempt charitable to		private foundation_	E If private foundation status under section 507(b)(1)(A)	
·		rom Part II, column (c), line 16)	Other (specify) column (d) must be or		F If the foundation is in a 60- under section 507(b)(1)(B)	
F	Part I		(a) Revenue and	(b) Net investme		(d) Disbursements
_		Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )  1 Contributions, gifts, grants, etc. received (att sch)	expenses per books	income	income	for charitable purposes (cash basis only)
(. <del>*</del> .^1		2 Ck X if the foundn is not req to att Sch B				
3020		3 Interest on savings and temporary cash investments				1
(%) (%)		4 Dividends and interest from securities 5a Gross rents	21,293.	21, 29	21,293.	
	_	b Net rental income or (loss)	3,266.	<del></del>		
MAR	R E	6a Net gain/(loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 42,000.	3,260.	<del></del>		
[-]	V E N	7 Capital gain net income (from Part IV, line 2),		3,26	66.	
نبر	U	Net short-term capital gain     Income madifications				
	E	10 a Gross sales less O				
には対対象が		allowances  b Less roots of MAR 2 6 2012 0				<u>.                                    </u>
	İ	c Gross profit/(loss) (att sch)				
		11 Other income (attach schedule)				
_		12 Total Add lines 1 through 11 13 Compensation of officers, directors, trustees, etc.	24,559. 0.	24,55	9. 21,293.	
		13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages	0.1	<u> </u>	<del></del>	<del></del>
		15 Pension plans, employee benefits				
	A D	16a Legal fees (attach schedule)	1 000	1 02		
	M i N	b Accounting fees (attach sch) See St 1 c Other prof fees (attach sch)	1,280.	1,28	30.	
	P S	17 Interest. 18 Taxes (attach schedule)(see instrs)				
	OPERAT.	19 Depreciation (attach sch) and depletion				
	Ņ V G E	20 Occupancy 21 Travel, conferences, and meetings				
	A E N X D P	22 Printing and publications				
	Ď P E N	23 Other expenses (attach schedule) See Statement 2	209.	20	09.	
	S	24 Total operating and administrative expenses. Add lines 13 through 23	1,489.	1,48		
	5	25 Contributions, gifts, grants paid Part XV	42,000.	1,40		42,000.
		26 Total expenses and disbursements. Add lines 24 and 25	43,489.	1,48	39. 0.	42,000.
		27 Subtract line 26 from line 12: a Excess of revenue over expenses				
		and disbursements	-18,930.			
		b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-)		23,0	21,293.	
	200	Car Panenwork Reduction Act Notice see inc	L	L	21,293.	C 000 DE (0011)

orm	990-1	PF (2011) CARL KIRBY ARNOLD JR CHARITABLE T	RUST	42-	-6673691	Page <b>2</b>
Dark	<u> </u>	Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	E	nd of year	
Part	<u> </u>	Balance Sheets column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	e (c) Fa	ır Market Value
		Cash - non-interest-bearing	21,922.	20,4	57.	20,457.
ļ	2	Savings and temporary cash investments				
l	3	Accounts receivable .				
		Less: allowance for doubtful accounts ▶				·
	4	Pledges receivable			i	
		Less allowance for doubtful accounts				
- 1	5	Grants receivable				<del></del>
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)		·		
	7	Other notes and loans receivable (attach sch)				
A S E T		Less allowance for doubtful accounts				
<u>š</u>	8	Inventories for sale or use				
F	9	Prepaid expenses and deferred charges				
Ś	10 a	Investments — U.S. and state government obligations (attach schedule)				· ·
	b	Investments — corporate stock (attach schedule)	628,832.	612,9		560,372.
(	c	: Investments — corporate bonds (attach schedule)	241,458.	239,7	11.	259,572.
	11	Investments — land, buildings, and equipment basis				
		Less: accumulated depreciation (attach schedule)				
		Investments – mortgage loans			<del></del>	<del> </del>
	13	,			<del></del>	
	14	Land, buildings, and equipment. basis				
		Less: accumulated depreciation (attach schedule)			1	
	15	Other assets (describe See Statement 3)  Total assets (to be completed by all filers —	<del></del>		1.	<del></del>
	10	see the instructions Also, see page 1, item l)	892,212.	873,0	96.	840,401.
٠٢.	17	Accounts payable and accrued expenses				
Å	18	Grants payable				
Ŗ	19	Deferred revenue				
Ĺ	20	Loans from officers, directors, trustees, & other disqualified persons	<u></u>			
Ţ	21	Mortgages and other notes payable (attach schedule)				•
i	22	Other liabilities (describe				,
E S	23	Total liabilities (add lines 17 through 22)	0.		0.	
		Foundations that follow SFAS 117, check here			<del> </del>	
		and complete lines 24 through 26 and lines 30 and 31.				
NF	24	Unrestricted	892,212.	873,0	96.	
N F E U T N	25	Temporarily restricted	<u> </u>		<del></del>	,
D	26	Permanently restricted			_	
A B A L A		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.				1
ĔĹ	27	Capital stock, trust principal, or current funds				
SÑ	28	Paid-in or capital surplus, or land, building, and equipment fund	<del></del>			
οË	29	Retained earnings, accumulated income, endowment, or other funds		<del></del>		
RS	30	Total net assets or fund balances (see instructions)	892,212.	873,0	96.	
	31	Total liabilities and net assets/fund balances				
		(see instructions)	892,212.	<u>873,0</u>	96.	
rar	[ 111	Analysis of Changes in Net Assets or Fund Balanc	es		<del></del>	
1	Tota	I net assets or fund balances at beginning of year - Part II, colu	ımn (a), line 30 (must aç	ree with		000 011
_		of-year figure reported on prior year's return)			1	892,212.
_		er amount from Part I, line 27a			2	-18,930.
3		Increases not included in line 2 (itemize)			3	873.282
4	$\neg uu$	IIIIGA I. Z. GIIU V			. 44 1	0/3 /8/

873,096.

186.

5

6

Part		osses for Tax on Investmen			<del></del>	
	(a) List and describe 2-story brick warehous	the kind(s) of property sold (e.g , re e, or common stock, 200 shares ML	eal estate, C Company)	(b) How acqu P — Purcha D — Donati	ise (month, day, year)	
		UARD 500 INDEX FUND ADM		P	Various	5/20/11
		ARD SMALL-CAP INDEX FUN		P	Various	5/20/11
	1119.43 SHARES VANG	UARD TOTAL BOND MKT IND	DEX ADM	<u> P</u>	Various	5/20/11
<u>d</u>						
<u>e</u>	(e) Gross sales price	(f) Depreciation allowed	(g) Cost or other basi	<u> </u>	(h) Gain oi	(loss)
	· · · · · · · · · · · · · · · · · · ·	(or allowable)	plus expense of sale		(e) plus (f) r	ninus (g)
<u>a</u>	15,000.			,103.		<u>-103.</u>
b	15,000.			,245.		2,755.
	12,000.		11	,386.		614.
e	<del></del>		<del></del>			
	Complete only for assets showi	ng gain in column (h) and owned by	the foundation on 12/31/69		(I) Gains (Co	lumn (h)
	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if an		gain minus column than -0-) or Losses (	(k), but not less
а						-103.
b			<del> </del>			2,755.
<u> </u>						614.
<u>d</u>			<del> </del>			
e 2 (	Capital gain net income or (net	capital loss)   If gain, also	enter in Part I, line 7 er -0- in Part I, line 7			2 266
3 1	lot short form capital dain or (	loss) as defined in sections 1222(5)	_	}-	2	3,266.
	. •	•	· · · _ ¬			
	i gain, also enter in Part I, line n Part I, line 8	8, column (c) (see instructions) If	(loss), enter -U-		3	0.
Part	V Qualification Under	Section 4940(e) for Reduce	d Tax on Net Investme	nt Incon	ne	
If 'Yes	the foundation does not qual	tion 4942 tax on the distributable am	mplete this part		Yes	X No
1_6	<del></del>	n each column for each year, see th	<del></del>	any entrie		
С	(a) Base period years alendar year (or tax year beginning in)	<b>(b)</b> Adjusted qualifying distributions	(c) Net value of noncharitable-use asse	ets	(d) Distributio (column (b) divided	n ratio d by column (c))
	2010	36,615.	849	,435.		0.043105
	2009	25,000.		,952.		0.033380
	2008		501	,354.		
	2007					<del></del>
	2006	<u></u> _			<del></del>	<del></del>
2 1	otal of line 1, column (d)			ļ	2	0.076485
	•	o E year base period - duide the to	atal an line 2 hij E. as hij tha	<u> </u>		0.070403
3 A	number of years the foundation	e 5-year base period — divide the to has been in existence if less than 5	or the 2 by 5, or by the 5 years	}-	3	0.025495
<b>4</b> E	Enter the net value of nonchari	table-use assets for 2011 from Part	X, line 5	}_	4	865,361.
5 1	Multiply line 4 by line 3			-	5	22,062.
6 E	Enter 1% of net investment inc	ome (1% of Part I, line 27b).		-	6	231.
7 /	Add lines 5 and 6			_	7	22,293.
8 8	Enter qualifying distributions fr	om Part XII, line 4			8	42,000.
l F	f line 8 is equal to or greater to Part VI instructions.	han line 7, check the box in Part VI,	line 1b, and complete that p	art using	a 1% tax rate See	the

Form 990-PF (2011) CARL KIRBY ARNOLD JR CHARITABLE TRUST 42-6673691		Þ	age 4
Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instruction	 s)	<u></u> -	~gv ~
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>b</b> Domestic foundations that meet the section 4940(e) requirements in Part V,		2	231.
check here ► X and enter 1% of Part I, line 27b			
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-)			0.
3 Add lines 1 and 2		2	231.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			0.
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		2	231.
6 Credits/Payments			
a 2011 estimated tax pmts and 2010 overpayment credited to 2011			
b Exempt foreign organizations — tax withheld at source 6b			
c Tax paid with application for extension of time to file (Form 8868)			
d Backup withholding erroneously withheld			
7 Total credits and payments Add lines 6a through 6d.			<u>0.</u>
8 Enter any penalty for underpayment of estimated tax. Check here. If Form 2220 is attached.			
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed		2	<u>231.</u>
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2012 estimated tax			
Part VII-A Statements Regarding Activities			
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?	1a	Yes	No X
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	16		х
If the answer is 'Yes' to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published			
or distributed by the foundation in connection with the activities	1		1
c Did the foundation file Form 1120-POL for this year?	1c		Х
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
(1) On the foundation $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	, (		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ►\$ 0.	1		ĺ
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		x
If 'Yes,' attach a detailed description of the activities			<u> </u>
·			}
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	3		_ x_
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
<b>b</b> If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?	4b	N	/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
If 'Yes,' attach the statement required by General Instruction T			<del></del>
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
By language in the governing instrument, or			
<ul> <li>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?</li> </ul>	6		Х
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	Х	
8a Enter the states to which the foundation reports or with which it is registered (see instructions)			
TX			
<b>b</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 <i>General Instruction G? If 'No,' attach explanation</i>	8ь	Х	
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)? If 'Yes,' complete Part XIV	9		x
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10		х
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_	m 990-PF (2011) CARL KIRBY ARNOLD JR CHARITABLE TRUST	42-	667369	1	Р	age <b>5</b>
Pa	art 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 disquali advisory privileges? If 'Yes,' attach statement (see instructions)	fied pers	on had	12		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemptio  Website address.  ► N/A	n applica	tion?	13	Х	
14	The books are in care of - JAMES CARL ARNOLD Telephone	e no 🕨		- <del>-</del>		
	Located at ► 4608 89TH STREET LUBBOCK TX ZIP + 4 ►	<u> 794</u>	24	:-		<del></del>
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> — Check here and enter the amount of tax-exempt interest received or accrued during the year	<b>▶</b>   -	15	N/A	•	∐ N/A
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other a bank, securities, or other financial account in a foreign country?	_		16	Yes	No X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1. If 'Yes,' enter the n foreign country.	ame of th	ne			
Ра	art 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
1	a 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	XNo			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes	XNo		, ,	
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X 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	XNo			
	(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	XNo			:
	<b>b</b> If any answer is 'Yes' to 1a(1)-(6), did <b>any</b> 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)	)?	_	1 b	N.	/A
	Organizations relying on a current notice regarding disaster assistance check here	•	· 📙			
	c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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)).				6	!
	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?	Yes	XNo			
	If 'Yes,' list the years 20, 20, 20, 20					
	<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942 <b>all</b> years listed, answer 'No' and attach statement — see instructions)			26	, NT	/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		_2b	IN,	/ A
	► 20 , 20 , 20 , 20					
3	Ba Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes	X 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 approve 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)	ed		3b	N	/A
,	- '			30	IN	<u> </u>
4	4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4a		Х
	<b>b</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		х

Form 990-PF (2011) CARL KIRBY ARNOLD			42-66	73691	Page <b>6</b>
Part VII-B Statements Regarding Activit		<u>1 4720 May Be Req</u>	uired (continued)		
5a During the year did the foundation pay or incu	•		റ. ത	1	
(1) Carry on propaganda, or otherwise attempt	ot to influence legislation	on (section 4945(e))?	Yes X	No	
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	ation drive?			No	
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	∐ Yes X	No	1
(4) Provide a grant to an organization other to in section 509(a)(1), (2), or (3), or section	han a charitable, etc, oi i 4940(d)(2)? (see instri	rganization described uctions)	Yes X	No	
(5) Provide for any purpose other than religio educational purposes, or for the prevention	ous, charitable, scientific on of cruelty to children	c, literary, or or animals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a current notice regard	qualify under the excep ding disaster assistance	tions	5 b	N/A
Organizations relying on a current notice rega	irding disaster assistant	ce check here	▶	}	.
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	sibility for the grant?	•	N/A Yes	] No	
If 'Yes,' attach the statement required by Reg	ulations section 53.494	5-5(d)			}
6a Did the foundation, during the year, receive a on a personal benefit contract?			∐Yes X	]No	
<b>b</b> Did the foundation, during the year, pay prem	iums, directly or indirec	ctly, on a personal bene	fit contract?	<u>6b</u>	<del>  X</del>
If 'Yes' to 6b, file Form 8870.  7a At any time during the tax year, was the found	dation a party to a prob	whited tay shelter transa	ection? Yes X	No	
<b>b</b> If 'Yes,' did the foundation receive any process	, , ,			N/A 7b	
Part VIII Information About Officers, D					<del></del>
and Contractors					
1 List all officers, directors, trustees, foundation		1 <del></del>	ructions).	<del></del>	
(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		se account, lowances
JAMES CARL ARNOLD	Trustee	0.	0.		0.
4608 89TH STREET LUBBOCK, TX 79424	4.00				
2 Compensation of five highest-paid employed	<del></del>	1—————————————————————————————————————	<del></del>	T	
(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		se account, lowances
None					
~					
Total number of other employees paid over \$50,000			<b>•</b>		0
BAA	TEEA0306L	12/05/11		Form 99	90-PF (2011)

1. C. C.

Form 990-PF (2011) CARL KIRBY ARNOLD JR CHARITABLE TRUST	42-667	
Part VIII Information About Officers, Directors, Trustees, Foundation and Contractors (continued)	Managers, Highly Paid E	mployees,
3 Five highest-paid independent contractors for professional services (see instruction	ns). 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	<b>&gt;</b>	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 organizations and other beneficiaries served, conferences convened, research papers produced, etc.	on such as the number of	Expenses
1 NONE (FOUNDATION'S SOLE ACTIVITY IS MAKING GRANTS TO ORGANIZATIONS)	EXEMPT	
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		
2		
All other program-related investments See instructions		
3		
Total. Add lines 1 through 3	<b></b>	0.
BAA		Form <b>990-PF</b> (2011)

Form **990-PF** (2011)

4

Part X' Minimum Investment Return (All domestic foundations must complete this part. see instructions.)	Foreign for	undations,
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	1 a	857,349.
<b>b</b> Average of monthly cash balances	1 b	21,190.
c Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1 d	878,539.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
· · · · · · · · · · · · · · · · · · ·	o.	
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	878,539.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	13,178.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	865,361.
6 Minimum investment return. Enter 5% of line 5	6	43,268.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private op	erating fou	
and certain foreign organizations check here \ and do not complete this part.		
1 Minimum investment return from Part X, line 6	1	43,268.
2a Tax on investment income for 2011 from Part VI, line 5	1.	
<b>b</b> Income tax for 2011 (This does not include the tax from Part VI)	7 ]	
c Add lines 2a and 2b	2c	231.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	43,037.
4 Recoveries of amounts treated as qualifying distributions.	4	<del> </del>
5 Add lines 3 and 4	5	43,037.
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	43,037.
Part XII Qualifying Distributions (see instructions)		
Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1 a	42,000.
<b>b</b> Program-related investments — total from Part IX-B	1 b	<del> </del>
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>b</b> Cash distribution test (attach the required schedule)	3Ь	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	42,000.
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	231.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	41,769.
<b>Note.</b> The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whe qualifies for the section 4940(e) reduction of tax in those years.	ther the found	dation

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Form 990-PF (2011)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	<b>(c)</b> 2010	<b>(d)</b> 2011
1 Distributable amount for 2011 from Part XI, line 7	,	,		43,037.
2 Undistributed income, if any, as of the end of 2011.		,		
a Enter amount for 2010 only	· · · · · · · · · · · · · · · · · · ·		42,280.	
<b>b</b> Total for prior years. 20, 20, 20	·	0.	·	<del></del>
3 Excess distributions carryover, if any, to 2011.	, ,			•
<b>a</b> From 2006 .			i, i	, d
<b>b</b> From 2007	<b> </b>	, 1		•
<b>c</b> From 2008 <b>d</b> From 2009	,			
e From 2010	1		` •	, , ,
f Total of lines 3a through e	0.		• •	0.
4 Qualifying distributions for 2011 from Part	` ,		· · · · · · · · · · · · · · · · · · ·	,
XII, line 4: ► \$ 42,000.			, ,	
a Applied to 2010, but not more than line 2a			42,000.	
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions)	,	0.	`;	,
c Treated as distributions out of corpus				
(Election required – see instructions)	0.			
d Applied to 2011 distributable amount	ļ	<del></del>	<del> </del>	0.
e Remaining amount distributed out of corpus	0.		*	0.
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the	·	· · · · · · · · · · · · · · · · · · ·		
same amount must be shown in column (a) )		[	1	
	1.5		,	
6 Enter the net total of each column as indicated below:	,			1
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.		•	
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b	, 4	0.		
c Enter the amount of prior years' undistribut- ed income for which a notice of deficiency				* * *
has been issued, or on which the section				
4942(a) tax has been previously assessed	,	0.	· · · · · · · · · · · · · · · · · · ·	<del> </del>
d Subtract line 6c from line 6b Taxable	,	0.	ļ	
amount – see instructions		ļ <u>0</u> .		<del> </del>
<ul> <li>Undistributed income for 2010. Subtract line 4a from line 2a Taxable amount — see instructions</li> </ul>		,	280.	
mile Ed. Takasia dinadik. 333 manadisi	- 1			
f Undistributed income for 2011 Subtract lines	1/3	,		
4d and 5 from line 1. This amount must be distributed in 2012.	,	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	,	43,037.
7 Amounts treated as distributions out of		,		
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)				
(see instructions)	0.			
8 Excess distributions carryover from 2006 not				
applied on line 5 or line 7 (see instructions)	0.		ļ. <u></u> ,	ļ
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2007			<b>\</b>	
<b>b</b> Excess from 2008		1		
c Excess from 2009	1			-
d Excess from 2010	4			
e Excess from 2011	<u> </u>	L	L	5 000 PF (0011)

Form 990-PF (2011) CARL KIRBY ARNOL			4 \ //L	42-66/3691	
Part XIV Private Operating Foundate  1 a If the foundation has received a ruling or of the foundation of the foundation has received a ruling or of the ruling					N/A
is effective for 2011, enter the date of the	ruling	that it is a private	operating loundation	I, and the ruling	
<b>b</b> Check box to indicate whether the foundate	tion is a private ope	rating foundation of	described in section	4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net	Tax year		Prior 3 years	,	
income from Part I or the minimum investment return from Part X for each year listed	(a) 2011	<b>(b)</b> 2010	(c) 2009	(d) 2008	(e) Total
<b>b</b> 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					····
d Amounts included in line 2c not used directly for active conduct of exempt activities					
<ul> <li>Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c</li> </ul>					
3 Complete 3a, b, or c for the alternative test relied upon					
a 'Assets' alternative test — enter				}	
<ul><li>(1) Value of all assets</li><li>(2) Value of assets qualifying under</li></ul>					<del></del>
section 4942(j)(3)(B)(i) <b>b</b> 'Endowment' alternative test — enter 2/3 of					<del></del>
minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test – enter			-	(	
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income			<del></del>		
Part XV Supplementary Information assets at any time during the	(Complete this le vear — see in	part only if the structions.)	organization ha	id \$5,000 or mor	e in
Information Regarding Foundation Mana a List any managers of the foundation who close of any tax year (but only if they hav None	have contributed mo	ore than 2% of the than \$5,000) (See	total contributions resection 507(d)(2))	eceived by the found	lation before the
<b>b</b> List any managers of the foundation who a partnership or other entity) of which the None	own 10% or more o foundation has a 1	f the stock of a co 0% or greater inter	rporation (or an equa rest	ally large portion of t	he ownership of
2 Information Regarding Contribution, Gra	nt, Gift, Loan, Scho	larship, etc, Progr	ams:		
Check here ► X if the foundation only requests for funds of the foundation make	makes contributions es gifts, grants, etc,	to preselected cha (see instructions)	arītable organizations to individuals or orga	s and does not accer anizations under othe	ot unsolicited er conditions,
complete items 2a, b, c, and d  a The name, address, and telephone number	er of the person to	vhom applications	should be addressed		
			0.100.0000	-	
<b>b</b> The form in which applications should be	submitted and infor	mation and materi	als they should inclu	de	· · · · · · · · · · · · · · · · · · ·
c Any submission deadlines					
d Any restrictions or limitations on awards,	such as by geograp	hical areas, charita	able fields, kinds of i	nstitutions, or other	factors

Page 11

3 Grants and Contributions Paid During the Y	ear or Approved for Fut	ure Paymen		
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)	substantial contributor	recipient	oona saaca	
Name and address (home or business)  a Paid during the year  SOUTH PLAINS COUNCIL - BSA LUBBOCK, TX	any foundation manager or substantial contributor  N/A	PUBLIC	GENERAL PURPOSE	42,000.
	<u> </u>			
Total		<del></del>	<u>► 3</u>	3a 42,000.
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)
1 Progr	am service revenue	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	<b>(d)</b> Amount	Related or exempt function income (See instructions)
-		1		Couc		<del></del>
		<del> </del>		<del>                                     </del>		
		<del> </del>		<del></del>		
۳		<del>                                     </del>		<del>  </del>	<del> </del>	<del></del>
		<del>                                     </del>		11-		<del></del>
·		<del> </del>	<del></del>	<del>  -</del>		
n Fees	and contracts from government agencies	<del>                                     </del>		<del> </del>	<del>-</del>	
•	pership dues and assessments	<del></del>		<del>                                     </del>		<del> </del>
	t on savings and temporary cash investments	<del> </del>		14		<del></del>
	ends and interest from securities			14	21,293.	· <del></del>
	ental income or (loss) from real estate:					
	financed property					
	ebt-financed property			+		
	ital income or (loss) from personal property					
	investment income					
8 Gain or	(loss) from sales of assets other than inventory					3,266.
9 Net in	ncome or (loss) from special events					
10 Gross	profit or (loss) from sales of inventory					
11 Other						
а	·				-	
			<del></del>			
e		<del>                                     </del>				
12 Subto	otal Add columns (b), (d), and (e)	L.,	<del></del>		21,293.	
10 7-4-1	Add line 10 columns (b) (d) and (a)				13	24,559.
	. Add line 12, columns (b), (d), and (e)				-	
	heet in line 13 instructions to verify calculation	ons)	<del> </del>			
(See works			hment of Exem	pt Purpose		
See works Part XVI	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	——————		es	
(See works	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	——————		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation	Accomplis	——————		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	——————		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	——————		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis	<del></del>		es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis			es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis			es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis			es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis			es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis			es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis			es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis			es	
See works Part XVI Line No.	heet in line 13 instructions to verify calculation.  B Relationship of Activities to the	Accomplis			es	

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

	Exempt organiz			<del> </del>						
describe	organization directly ed in section 501(c) o to political organizati	of the Code (of	ngage in any of the ther than section 50	following wit 1 (c)(3) organ	h any othe iizations) o	r organization r in section 5	n 27,		Yes	No
a Transfer	rs from the reporting	foundation to	a noncharitable exe	empt organiza	ation of			1		ı
(1) Cash								1a(1)	1 1	X
(2) Other assets								1a(2)		X
	ansactions									
(1) Sales of assets to a noncharitable exempt organization										Х
(2) Purchases of assets from a noncharitable exempt organization								1 b (1) 1 b (2)		X
(3) Rental of facilities, equipment, or other assets								1 b (3)		X
(4) Reimbursement arrangements								1b (4)		X
(5) Loans or loan guarantees								1 b (5)		X
(6) Performance of services or membership or fundraising solicitations								1 b (6)	$\vdash$	X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees								1c		X
Containing	or lacilities, equipme	citt, maining is	313, 011101 033013, 01	para cripioyo	-63				11	<del></del>
<b>d</b> If the ar the good any tran	nswer to any of the a ds, other assets, or s nsaction or sharing ar	bove is 'Yes,' services given rrangement, si	complete the follow by the reporting fou how in column <b>(d)</b> th	ing schedule indation If the ne value of the	. Column <b>(l</b> e foundatione goods, co	b) should alw on received lother assets.	ays show thess than fair	ie fair market val market value in received	ue of	
(a) Line no.	(b) Amount involved		of noncharitable exempt of					ons, and sharing arra		
N/A	<del></del>		<del></del>				<del></del>	<u> </u>		
								<del> </del>		
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		<del> </del>								
		<u> </u>								
	oundation directly or led in section 501(c) or complete the follows		ated with, or related ther than section 50	l to, one or m 1(c)(3)) or in	nore tax-ex section 52	empt organiz 27?	ations	Ye	s X	No
	) Name of organizati		(b) Type of organization				Description	n of relationship		
N/A	y Harrie of organizati		(b) Type of	organization			Description	Torrelationship		
14/21						<del></del>		<del></del>		
	<del></del>		<del> </del>			<del></del>				
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	<del></del>		<del> </del>	<del></del>	<del></del>			<del></del>		
Under	manus of parture. I declar	ro that I have	uned this return, including	200000000000000000000000000000000000000	bodulos sod si	latamanta and ta	4b - b - 4 - 6 1	land de la caracter d		
Sign	penalities of perjury, I declar , and complete Declaration	at preparer (other	than taxpayer) is based or	accompanying sol	f which prepai	rer has any know	ledge	May the	IRS disci	uss
Here	Dung (	-(1/2)	-W 21/h	740.62	-12	(+)	4116	, preparei	rn with the shown b	pelow
Sign	ature of officer or trustee		Date	e	Title			Kee INS	ructions)	ĺn₀ l
	Print/Type preparer's nar	me	Preparer's signa	ature 1 / -		Date /	Check	If PTIN	<u> </u>	لكتنب
Paid	RICK MARTIN		Mari	n Whai	the	3/1/2	self-emplo	120001	1352	
		Robinson F	Burdette Mart	in & Ser	ight	LLP		75-2489868		
Preparer	_		e Road Suite		<u>-9,</u>		, am a Elly	75 2403000		
Use Only			TX 79424				Phone	(806) 744-	3333	
DAA.	<u></u>		1,7343		<del></del>		Phone no			
BAA								Form <b>9</b> 9	ル・۲F(	(2011)

2011	Federal Statements	Page 1		
Client 834003	CARL KIRBY ARNOLD JR CHARITABLE TRUST	42-6673691		
2/28/12		04 04PM		
Statement 1 Form 990-PF, Part I, Line 16b Accounting Fees				
ROBINSON, BURDETTE, MAI	(a) (b) Net (c)  Expenses Investment Adjusted  per Books Income Net Income  RTIN & SERIGHT  \$ 1,280. \$ 1,280.  Total \$ 1,280. \$ 1,280.  \$ 0.	(d) Charitable Purposes  \$ 0.		
Statement 2 Form 990-PF, Part I, Line 23 Other Expenses				
FOREIGN TAX PAID	(a)       (b)       Net       (c)         Expenses       Investment       Adjusted         per Books       Income       Net Income         \$ 209.       \$ 209.         Total       \$ 209.       \$ 209.	(d) Charitable Purposes  \$ 0.		
Statement 3 Form 990-PF, Part II, Line 15 Other Assets				
Rounding .	Book Value         F           1.         1.           \$         1.           \$         1.	air Market Value 0.		
Statement 4 Form 990-PF, Part III, Line 5 Other Decreases 2010 FORM 990-PF INCOM	E TAX Total \$	186. 186.		

. : . . .