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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2011

For calendar year 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Name of foundation
The Sarah and Ross Perot Jr Foundation

Number and street (or P O box number if mail is not delivered to street address)
PO Box 269014

City or town, state, and ZIP code
Plano, TX 75026

A Employer identification number
43-1964344

B Telephone number (see page 10 of the instructions)
(972) 535-1900

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ☐

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

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization ☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)
\$ 16,523,674

J Accounting method ☒ Cash ☐ Accrual

☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	1,311,917			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	229,334	229,334		
	4 Dividends and interest from securities.				
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	12,283			
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV, line 2)		12,283		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	643	26		
	12 Total. Add lines 1 through 11	1,554,177	241,643		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	10,428	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule).	56,278	18,233		38,045
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	66,706	18,233		38,045
	25 Contributions, gifts, grants paid	3,383,911			3,383,911
	26 Total expenses and disbursements. Add lines 24 and 25	3,450,617	18,233		3,421,956
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-1,896,440			
	b Net investment income (if negative, enter -0-)		223,410		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	1,656	230,205	230,205
	2	Savings and temporary cash investments	4,000,000	1,000,000	1,000,000
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	14,393,237	15,268,248	15,288,219
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	5,250	5,250	5,250	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	18,400,143	16,503,703	16,523,674	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	18,400,143	16,503,703	
	30	Total net assets or fund balances (see page 17 of the instructions)	18,400,143	16,503,703	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	18,400,143	16,503,703	

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	18,400,143
2	Enter amount from Part I, line 27a	2	-1,896,440
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	16,503,703
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	16,503,703

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	Petrus Short Term Fund LP 26-3724953	P		
b	Petrus Short Term Fund LP 26-3724953	P		
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			14,154
b			-1,871
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			14,154
b			-1,871
c			
d			
e			

2	Capital gain net income or (net capital loss)	<div><div>If gain, also enter in Part I, line 7</div><div>If (loss), enter -0- in Part I, line 7</div></div>	2	12,283
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)		3	
If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions)				
If (loss), enter -0- in Part I, line 8				

Part V

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	7,446,365	21,508,894	0 346199
2009	2,704,884	10,096,646	0 267899
2008	1,319,637	1,932,491	0 682868
2007	1,192,231	761,435	1 565769
2006	682,276	1,659,485	0 411137

2	Total of line 1, column (d).	2	3 273872
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 654774
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	17,702,905
5	Multiply line 4 by line 3.	5	11,591,402
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,234
7	Add lines 5 and 6.	7	11,593,636
8	Enter qualifying distributions from Part XII, line 4.	8	3,421,956

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

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








1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1				
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)				
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	4,468	
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0	
3		Add lines 1 and 2.		3	4,468	
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	4,468	
6		Credits/Payments				
a		2011 estimated tax payments and 2010 overpayment credited to 2011	6a	4,900		
b		Exempt foreign organizations—tax withheld at source	6b			
c		Tax paid with application for extension of time to file (Form 8868)	6c			
d		Backup withholding erroneously withheld	6d			
7		Total credits and payments. Add lines 6a through 6d.		7	4,900	
8		Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8		
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9		
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	432	
11		Enter the amount of line 10 to be Credited to 2012 estimated tax	432	Refunded	11	0

Part VII-AStatements Regarding Activities

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




















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 page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address  N/A	13	Yes	
14	The books are in care of  JY Robb III Telephone no  (972) 535-1930 Located at  2300 W Plano Parkway Plano TX ZIP+4  75075			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here  and enter the amount of tax-exempt interest received or accrued during the year.	15		
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	Yes	No
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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. 	1b		No
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		No
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?  Yes  No If "Yes," list the years  20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  20____, 20____, 20____, 20____			
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	5b		No
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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Henry Ross Perot Jr	Trustee, Vice	0	0	0
PO Box 269014 Plano, TX 75026	President/Tr 0 00			
Sarah F Perot	Trustee, President/Sec	0	0	0
PO Box 269014 Plano, TX 75026	20 00			
Darcy Glen Anderson	Trustee	0	0	0
PO Box 269014 Plano, TX 75026	0 00			
J Y Robb III	Trustee, Asst	0	0	0
PO Box 269014 Plano, TX 75026	Secretary 0 00			
2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
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 page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. <div></div>		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 The Foundation makes grants to other organizations to assist them in conducting their direct charitable activities	0
2 The Foundation provides assistance to unrelated individuals who are eligible recipients	0
3 The Foundation provides assistance to other indigent individuals	0
4 <div></div>	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 <div></div>	
2 <div></div>	
All other program-related investments See page 24 of the instructions	
3 <div></div>	
Total. Add lines 1 through 3. <div></div>	0

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	17,898,739
b	Average of monthly cash balances.	1b	68,503
c	Fair market value of all other assets (see page 24 of the instructions).	1c	5,250
d	Total (add lines 1a, b, and c).	1d	17,972,492
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	17,972,492
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	269,587
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	17,702,905
6	Minimum investment return. Enter 5% of line 5.	6	885,145

Part XI

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

1	Minimum investment return from Part X, line 6.	1	885,145
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	4,468
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,468
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	880,677
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	880,677
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	880,677

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	3,421,956
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	3,421,956
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,421,956
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 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 page 26 of the instructions)			
c		Treated as distributions out of corpus (Election required—see page 26 of the 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 page 27 of the instructions.			
e		Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions.			
f		Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011.			
7		Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).			
8		Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the 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 XIVPrivate Operating Foundations (see page 27 of the 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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2011	(b) 2010	(c) 2009	(d) 2008	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

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

See Additional Data Table

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

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

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

Kristen Garcia
5500 Preston Road Suite 365
Dallas, TX 75205
(214) 528-2225

b

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

Please contact the named person above for details

c

Any submission deadlines

Please contact the named person above for details

d

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

Please contact the named person above for details

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)				
<div><div>a</div><div>Paid during the year</div><div>See Additional Data TableSee Additional Data Table</div></div>				
<div>Total</div>			<div>3a</div>	3,383,911
<div><div>b</div><div>Approved for future payment</div></div>				
<div>Total</div>			<div>3b</div>	0

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	229,334	
4 Dividends and interest from securities.					
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.			14	26	617
8 Gain or (loss) from sales of assets other than inventory			18	12,283	
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).		0		241,643	617
13 Total. Add line 12, columns (b), (d), and (e).			13		242,260

[illegible]

Part XVII

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

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1

Cash.

1a(1)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

d

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

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

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐

Yes

☒

No

b

If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
<div><div>Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.</div><div><div><div>*****</div><div>Signature of officer or trustee</div></div><div><div>2012-10-31</div><div>Date</div></div><div><div>*****</div><div>Title</div></div></div></div>		
<div><div>Sign Here</div><div>Paid Preparer's Use Only</div></div>	<div><div>Preparer's Signature</div><div>Jason W Mann</div></div>	<div><div>Date</div><div></div></div>
	<div><div>Firm's name</div><div>Petrus Trust Company LTA</div></div>	<div><div>Check if self-employed</div><div><input type="checkbox"/></div></div>
	<div><div>Firm's address</div><div>PO Box 269014 Plano, TX 75026</div></div>	<div><div>PTIN</div><div>P01343590</div></div>
<div><div>Firm's EIN</div><div>80-0168836</div></div>		<div><div>Phone no</div><div>(972) 535-1900</div></div>

May the IRS discuss this return with the preparer shown above? See instructions

☐

Yes

☒

No

Schedule B

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2011

Name of organization The Sarah and Ross Perot Jr Foundation	Employer identification number 43-1964344
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 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 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

Name of organization The Sarah and Ross Perot Jr Foundation	Employer identification number 43-1964344
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Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
<u>1</u>	Henry Ross Perot Jr PO Box 269014 Plano, TX 75026 _____	\$ <u>1,273,872</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>2</u>	SFP Inc PO Box 269014 Plano, TX 75026 _____	\$ <u>12,721</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>3</u>	Hillwood Management Ltd 3090 Olive Street Suite 200 Dallas, TX 75219 _____	\$ <u>25,324</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u> </u>	_____ _____ _____ _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u> </u>	_____ _____ _____ _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u> </u>	_____ _____ _____ _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization The Sarah and Ross Perot Jr Foundation	Employer identification number 43-1964344
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<div>Part II</div> <div>Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed</div>			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	<div></div> <div></div> <div></div> <div></div>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	<div></div> <div></div> <div></div> <div></div>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	<div></div> <div></div> <div></div> <div></div>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	<div></div> <div></div> <div></div> <div></div>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	<div></div> <div></div> <div></div> <div></div>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	<div></div> <div></div> <div></div> <div></div>	\$ _____	_____

Name of organization The Sarah and Ross Perot Jr Foundation	Employer identification number 43-1964344
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Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete columns (a) through (e) and the following line entry)
For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ➤ \$
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
—	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div>	<div></div>	
	<div></div>	<div></div>	
—	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div>	<div></div>	
	<div></div>	<div></div>	
—	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div>	<div></div>	
	<div></div>	<div></div>	
—	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>
	<div></div>	<div></div>	<div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div>	<div></div>	
	<div></div>	<div></div>	

Additional Data

Software ID:
Software Version:
EIN: 43-1964344
Name: The Sarah and Ross Perot Jr Foundation

Form 990PF - Special Condition Description:

Special Condition Description

Form 990PF Part XV Line 1a - 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).

Henry Ross Perot Jr
Sarah F Perot


Form 990PF Part XV Line 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				
Pastoral Counseling and Education Center4525 Lemmon Ave Suite 200 Dallas, TX 75219	None	Public Charity	Humanitarian	500
Highland Park Presbyterian Church3821 University Blvd Dallas, TX 75205	None	Public Charity	Disaster Relief Fund	62,500
Highland Park Presbyterian Church3821 University Blvd Dallas, TX 75205	None	Public Charity	Disaster Relief Fund	12,500
The University of Texas at Austin Lady Bird Johnson Wildflower Center4801 La Crosse Avenue Austin, TX 78739	None	Public Charity	Programs for conserving native plants and addressing ecological problems	1,500
Episcopal School of Dallas4100 Merrell Road Dallas, TX 75229	None	Public Charity	Educational support	15,000
The Arts Community AllianceOne Arts Plaza 1722 Routh Street Suite 115 Dallas, TX 75201	None	Public Charity	Provide financial support and awareness for the performing arts	10,000
The University of Texas at Austin Lady Bird Johnson Wildflower Center4801 La Crosse Avenue Austin, TX 78739	None	Public Charity	Programs for conserving native plants and addressing ecological problems	5,000
The University of Texas MD Anderson Cancer Center1515 Holcombe Blvd Houston, TX 77030	None	Public Charity	Medical Research	500
Highland Park Crime Watch Highland Park Department of Public Safety4700 Drexel Drive Highland Park, TX 75205	None	Public Charity	Provide crime alerts to community citizens	100
The Blair House Restoration FundPost Office 27208 Washington, DC 20038	None	Public Charity	Provide renovation support to housing used by foreign persons when visiting the U S	300
Circle Ten Council8605 Harry Hines Blvd Dallas, TX 75235	None	Public Charity	Promote youth development	15,000
Junior Achievement of Dallas Inc8003 Inwood Road Dallas, TX 75209	None	Public Charity	Humanitarian	2,000
Vogel Alcove7557 Rambler Road Suite 262 Dallas, TX 75231	None	Public Charity	Provides quality child development to homeless children	1,000
Fort Worth Symphony Orchestra330 E 4th Street Suite 200 Fort Worth, TX 76102	None	Public Charity	Support for the performing arts	10,000
Crystal Charity Ball30 Highland Park Village Suite 206 Dallas, TX 75205	None	Public Charity	Humanitarian	10,000
The New York Botanical Garden2900 Southern Blvd Bronx, NY 10458	None	Public Charity	Promote wildlife conservation	500
Southern Methodist UniversityPO Box 750402 Dallas, TX 75275	None	Public Charity	Meadows School of the Arts Support	2,000
The University of Texas at Austin Lady Bird Johnson Wildflower Center4801 La Crosse Avenue Austin, TX 78739	none	Public Charity	Programs for conserving native plants and addressing ecological problems	2,500
Brother Bill's Helping Hand3430 Odessa Street Dallas, TX 75212	None	Public Charity	Provides education, health and life essential support to West Dallas citiznes	25,000
Southern Methodist UniversityPO Box 750402 Dallas, TX 75275	None	Public Charity	Meadows School of the Arts Support	50,000
Highland Park Presbyterian Church3821 University Blvd Dallas, TX 75205	None	Public Charity	Disaster Relief Fund	12,500
Metro Dallas Homeless Alliance1818 Corsicana Street Dallas, TX 75201	None	Public Charity	Provide food and shelter to homeless people	20,000
Southern Methodist UniversityPO Box 750402 Dallas, TX 75275	None	Public Charity	Meadows School of the Arts support	10,000
Southwestern Medical Foundation2305 Cedar Springs Road Suite 150 Dallas, TX 75201	None	Public Charity	Medical Research	1,000
West Dallas Community Church2215 Canada Drive Dallas, TX 75212	None	Public Charity	Promote religious belief and opportunities	5,000
The Arts Community AllianceOne Arts Plaza 1722 Routh Street Suite 115 Dallas, TX 75201	None	Public Charity	Provide financial support and awareness for the performing arts	2,500
St Mark's School of Texas10600 Preston Road Dallas, TX 75230	None	Public Charity	Annual operating expenses	25,000
AT&T Performing Arts Center2100 Ross Ave Suite 650 Dallas, TX 75201	None	Public Charity	Support for the Performing Arts	25,000
St Mark's School of Texas10600 Preston Road Dallas, TX 75230	None	Public Charity	Building campaign	1,250,000
Carl H Hahn FoundationHollerplatz 1 Wolfbsburg GM	None	Public Charity	Provides community support	1,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
The Senior Source3910 Harry Hines Blvd Dallas, TX 75219	None	Public Charity	Promote the improvement of quality of life for the elderly	1,500
Justin Volunteer Fire Department 310 N Sealy Ave Justin, TX 76247	None	Public Charity	Community Service	250
Highland Park Presbyterian Church 3821 University Blvd Dallas, TX 75205	None	Public Charity	Disaster Relief Fund	12,500
West Dallas Community School 2215 Canada Drive Dallas, TX 75212	None	Public Charity	Support for ministry programs	30,000
Council on Foreign Relations58 East 68th Street New York, NY 10065	None	Public Charity	Promote the education of foreign policy and world affairs	8,333
Falcon Foundation3116 Academy Drive Suite 200 USAF Academy, CO 80804	None	Public Charity	Provide support for yound men and women pursuing involvement in the US Air Force	500
The Air Force Association1501 Lee Highway Arlington, VA 22209	None	Public Charity	Promote public understanding of the Aerospace Industry to the public	500
Operation Smile6435 Tidewater Drive Norfolk, VA 23509	None	Public Charity	Service the repair of childhood deformities	250
Dallas Symphony Orchestra2301 Flora Street Dallas, TX 75201	None	Public Charity	Support for the Performing Arts	10,000
Treasure Street2222 Welborn Street Dallas, TX 75219	None	Public Charity	Texas Scottish Rite Hospital service to handicapped children	25,000
Nightstalker Association11304 Bell Station Road Oak Grove, KY 42262	None	Public Charity	To preserve memories and provide support to fallen military personnel	35,000
North Texas Food Bank4500 S Cockrell Hill Road Dallas, TX 75236	None	Public Charity	Humanitarian	10,000
Joe Foss Institute14415 North 73rd Street Suite 109 Scottsdale, AZ 85260	None	Public Charity	Programs to inspire patriotism, public service & appreciation for America's freedoms	25,000
Friends of the Dallas Police3232 McKinney Ave Dallas, TX 75204	None	Public Charity	Promote crime prevention and community safety	5,000
The Town of Highland Park4700 Drexel Drive Highland Park, TX 75205	None	Public Charity	Promote Community Welfare	100
Lee Park and Arlington Hall Conservancy3625 N Hall Street Suite 690 Dallas, TX 75219	None	Public Charity	Promote the preservation and enhancement of Lee Park	1,000
Dallas Museum of Art1717 North Harwood Dallas, TX 75201	None	Public Charity	Support for Museum Art programs	2,000
The Salvation Army8787 N Stemmons Freeway Suite 800 Dallas, TX 75247	None	Public Charity	Programs to meet human needs in the community	100,000
Methodist Health System Foundation IncMHSF Building 360 Oak Harbor Blvd Slidell, LA 70458	None	Public Charity	Supports, develops, and manages health-related programs citizens of New Orleans	50,000
Legal Aid of Northwest Texas1515 Main Street Dallas, TX 75201	None	Public Charity	Provides legal service to low-income residents	500
Episcopal School of Dallas4100 Merrell Road Dallas, TX 75229	None	Public Charity	Educational support	15,000
Baylor Healthcare System Foundation3600 Gaston Avenue Suite 100 Dallas, TX 75246	None	Public Charity	Medical research	2,500
Dallas Zoological Society650 SRL Thornton Freeway Dallas, TX 75203	None	Public Charity	Support for the Center of Education & Wildlife Conservation	2,500
Highland Park Presbyterian Church 3821 University Blvd Dallas, TX 75205	None	Public Charity	Disaster Relief Fund	12,500
The Trinity Trust1444 Oak Lawn Ave Suite 200 Dallas, TX 75207	None	Public Charity	Provide financial support for public works projects in Dallas, TX	5,000
National Museum for Women in the Arts1250 New York Avenue Northwest Washington, DC 20005	None	Public Charity	Recognizes women's creative contributions to the community	1,000
Dallas Symphony Orchestra2301 Flora Street Dallas, TX 75201	None	Public Charity	Support for the Performing Arts	100,000
Rufus Felix4567 North OConnor Blvd Suite 1309 Irving, TX 75062	None	Other	Support for the Performing Arts	2,652
Dallas Symphony Orchestra2301 Flora Street Dallas, TX 75201	None	Public Charity	Support for the performing Arts	10,000
The Dallas Opera2403 Flora Ste 500 Dallas, TX 75201	None	Public Charity	Support for the Performing Arts	500

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
AT&T Performing Arts Center2100 Ross Ave Suite 650 Dallas, TX 75201	None	Public Charity	Support for the Performing Arts	1,160
Dallas Center for the Performing Arts2106 Boll Street Dallas, TX 75204	None	Public Charity	Support for the Performing Arts	333,333
George W Bush FoundationPO Box 600610 Dallas, TX 75206	None	Public Charity	Provide education and promote the advancement of public service in today's youth	333,333
The Global Fund for Children1101 14th Street NW Ste 420 Washington, DC 20005	none	Public Charity	Programs to advance the dignity of children around the world	100,000
Sailors for the Sea449 Thames Street 300D Newport, RI 02840	None	Public Charity	Educating and engaging the community in the worldwide protection of the oceans	1,000
Southern Methodist UniversityPO Box 750402 Dallas, TX 75275	None	Public Charity	Educational support	500,000
The Sweetheart BallPO Box 9106 Dallas, TX 75209	None	Public Charity	Medical research	15,000
The Blair House Restoration FundPost Office 27208 Washington, DC 20038	None	Public Charity	Provide renovation support to housing used by foreign persons when visiting the U S	35,000
The Volunteer Center2800 Live Oak Street Dallas, TX 75204	None	Public Charity	Connecting nonprofit organizations together to provide volunteer assistance	1,000
Light of Healing Hope Foundation2801 New Mexico Ave Suite 1224 Washington, DC 20007	None	Public Charity	Provides books of hope to hospitals to comfort patients	500
Episcopal School of Dallas4100 Merrell Road Dallas, TX 75229	None	Public Charity	Education Support	100
SM Wright Foundation9213 Sovereign Row Dallas, TX 75247	None	Public Charity	Provides support to families in the Dallas community	1,000
Dallas Museum of Art1717 North Harwood Dallas, TX 75201	None	Public Charity	Support for Museum Art Programs	15,000
FBI National Academy Associates IncFBI Academy Quantico, VA 22135	None	Public Charity	Provides high quality law enforcement to the community	500
Total  3a				3,383,911

TY 2011 Investments - Other Schedule

Name: The Sarah and Ross Perot Jr Foundation

EIN: 43-1964344

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Investment in Petrus Short Term Fund LP	AT COST	15,268,248	15,288,219

TY 2011 Other Assets Schedule

Name: The Sarah and Ross Perot Jr Foundation

EIN: 43-1964344

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Organizational Costs	5,250	5,250	5,250

TY 2011 Other Expenses Schedule

Name: The Sarah and Ross Perot Jr Foundation

EIN: 43-1964344

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Petrus Short Term Fund LP 26- 3724953	18,233	18,233		0
Rent Expense	9,101	0		9,101
Office Expense	26,211	0		26,211
Utility Expense	2,436	0		2,436
Insurance Expense	218	0		218
Property Tax Expense	79	0		79

TY 2011 Other Income Schedule

Name: The Sarah and Ross Perot Jr Foundation

EIN: 43-1964344

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Tax Exempt Income	617	0	617
Other Portfolio Income	26	26	26

TY 2011 Taxes Schedule

Name: The Sarah and Ross Perot Jr Foundation

EIN: 43-1964344

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Income Tax	10,428	0		0