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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
Lola Wright Foundation
co US Trust

A Employer identification number
74-6054717

Number and street (or P O box number if mail is not delivered to street address) Room/suite
515 Congress Ave 10th Floor

B Telephone number (see page 10 of the instructions)
(512) 397-2001

City or town, state, and ZIP code
Austin, TX 78701

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)* ▶$ 22,828,871

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)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	609,764	609,764		
	5a	Gross rents	665,884	665,884		
	b	Net rental income or (loss) 665,884				
	6a	Net gain or (loss) from sale of assets not on line 10	25,516			
	b	Gross sales price for all assets on line 6a 22,304,851				
	7	Capital gain net income (from Part IV, line 2)		25,516		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	3,462	3,462		
	12	**Total.** Add lines 1 through 11	1,304,626	1,304,626		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	17,500			17,500
	14	Other employee salaries and wages	43,160			43,160
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)	980	490		490
	b	Accounting fees (attach schedule)	7,850	3,925		3,925
	c	Other professional fees (attach schedule)	158,744	158,744		
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	31,976	20,769		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy	4,000			4,000
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	8,332			8,332
	24	**Total operating and administrative expenses.** Add lines 13 through 23	272,542	183,928		77,407
	25	Contributions, gifts, grants paid	1,081,521			1,081,521
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,354,063	183,928		1,158,928
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-49,437			
	b	**Net investment income** (if negative, enter -0-)		1,120,698		
	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			
	2	Savings and temporary cash investments	576,046	367,984	367,984
	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		3,793	3,793
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	13,964,812	18,425,892	18,797,094
	c	Investments—corporate bonds (attach schedule)	4,333,819		
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	197	197	3,660,000
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	18,874,874	18,797,866	22,828,871
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 ▶)	27,571		
	23	**Total liabilities** (add lines 17 through 22)	27,571	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☑ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	18,847,303	18,797,866	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see page 17 of the instructions)	18,847,303	18,797,866	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	18,874,874	18,797,866	

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	18,847,303
2	Enter amount from Part I, line 27a	2	-49,437
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	18,797,866
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	18,797,866

Part IV Capital Gains and Losses for Tax on Investment Income

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

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	25,516
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8	3	25,516

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	1,016,445	22,761,367	0 04466
2009	1,010,622	20,100,912	0 05028
2008	1,193,634	22,145,482	0 05390
2007	1,308,634	26,198,090	0 04995
2006	1,099,578	24,309,216	0 04523

2	**Total** of line 1, column (d)	2	0 24402
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 04880
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	22,486,156
5	Multiply line 4 by line 3	5	1,097,414
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	11,207
7	Add lines 5 and 6	7	1,108,621
8	Enter qualifying distributions from Part XII, line 4	8	1,158,928

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ **(attach copy of letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	11,207
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	
3	Add lines 1 and 2			3	11,207
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	11,207
6	Credits/Payments				
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	15,000		
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	15,000
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	3,793
11	Enter the amount of line 10 to be **Credited to 2012 estimated tax** ▶ 3,793	**Refunded** ▶		11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		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)?	1b		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 ▶ $ _____ **(2)** On foundation managers ▶ $ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ _____			
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		No
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?	13	Yes	

Website address ▶ N/A

14 The books are in care of ▶ US Trust Telephone no ▶ (512) 397-2001

Located at ▶ 515 Congress Ave 10th Floor Austin TX ZIP+4 ▶ 78701

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

			Yes	No
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		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)?	1b		No
	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		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		No
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? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.)*	3b		No
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))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	**5b**		**No**
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☑ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		**No**
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		**No**

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
See Additional Data Table				

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 ▶

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
RBC Wealth Mgmt - Riverbridge 301 Congress Ave Suite 2200 Austin, TX 78701	Investment Manager	27,937
Other Inv Advisors 301 Congress Ave Suite 2200 Austin, TX 78701	Investment Manager	55,639
RBC Wealth Mgmt - Hester Capital 301 Congress Ave Suite 2200 Austin, TX 78701	Investment Manager	26,146
RBC Wealth Mgmt - Brandes 301 Congress Ave Suite 2200 Austin, TX 78701	Investment Manager	21,140
Wells Fargo PO Box 41629 Austin, TX 787049926	Investment Manager	27,882
Total number of others receiving over $50,000 for professional services. . . . . ▶		

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	
2	
3	
4	

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	
2	
All other program-related investments See page 24 of the instructions **3**	
Total. Add lines 1 through 3. . . . . ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes			
a	Average monthly fair market value of securities		1a	18,612,858
b	Average of monthly cash balances		1b	555,727
c	Fair market value of all other assets (see page 24 of the instructions)		1c	3,660,000
d	**Total** (add lines 1a, b, and c)		1d	22,828,585
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	
3	Subtract line 2 from line 1d		3	22,828,585
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)		4	342,429
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	22,486,156
6	**Minimum investment return.** Enter 5% of line 5		6	1,124,308

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	1,124,308
2a	Tax on investment income for 2011 from Part VI, line 5	2a 11,207		
b	Income tax for 2011 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	11,207
3	Distributable amount before adjustments Subtract line 2c from line 1		3	1,113,101
4	Recoveries of amounts treated as qualifying distributions		4	
5	Add lines 3 and 4		5	1,113,101
6	Deduction from distributable amount (see page 25 of the instructions)		6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1		7	1,113,101

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	1,158,928
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,158,928
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	11,207
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,147,721

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				1,113,101
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only.			574,424	
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 ▶ $ 1,158,928				
a Applied to 2010, but not more than line 2a			574,424	
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). . .	0			
d Applied to 2011 distributable amount.				584,504
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				528,597
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 XIV **Private 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)

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

Part XV **Supplementary Information (Complete this part only if the 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))

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

Lola Wright Foundation
515 Congress Ave 10th Floor
Austin, TX 78701
(512) 397-2001

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

See attached grant application guidelines - Sch B

c Any submission deadlines

See attached grant application guidelines - Sch B

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

See attached grant application guidelines - Sch B

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
See attached Sch A Various Austin, TX 78701	N/A	(c)(3)	Various - see attached listing	1,081,521
Total . . . . . ▶ **3a**				1,081,521
b *Approved for future payment*				
Total . . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See 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					
4 Dividends and interest from securities			14	609,764	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property			15	665,884	
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	25,516	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a Foreign tax refunds-other			14	3,462	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				1,304,626	
13 **Total.** Add line 12, columns (b), (d), and (e)				13	1,304,626

(See worksheet in line 13 instructions on page 28 to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a(1)		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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

****** | 2012-05-04 | ******

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's Signature ▶ Bob Dunagan	Date	Check if self-employed ▶ ☑	PTIN
Firm's name ▶ Dunagan Jack LLP		Firm's EIN ▶	
Firm's address ▶ 3724 Jefferson Street Suite 307 Austin, TX 78731		Phone no (512)420-8997	

May the IRS discuss this return with the preparer shown above? See instructions ▶ ☑ Yes ☐ No

Additional Data

Software ID: 11000144
Software Version: 2011v1.2
EIN: 74-6054717
Name: Lola Wright Foundation
co US Trust

Form 990PF - Special Condition Description:

Special Condition Description

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
Publicly Traded - Hester Capital	P	2011-12-31	2011-12-31
Publicly Traded - Geneva Solutions	P	2011-12-31	2011-12-31
Publicly Traded - Thornburg Inv Mgmt	P	2011-12-31	2011-12-31
Publicly Traded - Westwood Mgmt	P	2011-12-31	2011-12-31
Publicly Traded - Riverbridge	P	2011-12-31	2011-12-31
Publicly Traded - Brandes Inv Partners	P	2011-12-31	2011-12-31
Publicly Traded - U S Trust	P	2011-12-31	2011-12-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
486,222		404,821	81,401
2,019,936		1,900,718	119,218
384,650		419,109	-34,459
565,271		465,689	99,582
319,388		300,133	19,255
487,208		655,108	-167,900
18,042,176		18,133,757	-91,581

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			81,401
			119,218
			-34,459
			99,582
			19,255
			-167,900
			-91,581

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
Anita Motloch 515 Congress Ave 10th Floor Austin, TX 78701	Director 1 00	2,500		
Carole Keeton Strayhorn 515 Congress Ave 10th Floor Austin, TX 78701	Director 1 00	2,500		
Adrian R Fowler 515 Congress Ave 10th Floor Austin, TX 78701	Director 1 00	2,500		
James Meyers 515 Congress Ave 10th Floor Austin, TX 78701	Director 1 00	2,500		
Ron Oliveira 515 Congress Ave 10th Floor Austin, TX 78701	Secretary 1 00	2,500		
Paul Hilgers 515 Congress Ave 10th Floor Austin, TX 78701	Vice President 1 00	2,500		
Wilford Flowers 515 Congress Ave 10th Floor Austin, TX 78701	President 1 00	2,500		

TY 2011 Accounting Fees Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Audit and tax return	7,850	3,925	0	3,925

TY 2011 Contractor Compensation Explanation

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 11000144

Software Version: 2011v1.2

Contractor	Explanation
Wells Fargo	
RBC Wealth Mgmt - Riverbridge	
RBC Wealth Mgmt - Hester Capital	
RBC Wealth Mgmt - Brandes	
Other Inv Advisors	

TY 2011 Investments Corporate Stock Schedule

Name: Lola Wright Foundation
co US Trust
EIN: 74-6054717
Software ID: 11000144
Software Version: 2011v1.2

Name of Stock	End of Year Book Value	End of Year Fair Market Value
RBC - Hester Capital		
RBC - Geneva Solutions		
RBC - Fixed Income		
RBC - Thornburg Int'l.		
RBC - Westwood		
RBC - Riverbridge		
RBC - Brandes Investment		
U.S. Trust	18,425,892	18,797,094

TY 2011 Investments - Other Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 11000144

Software Version: 2011v1.2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Oil and Gas properties	AT COST	197	3,660,000

TY 2011 Legal Fees Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Review of Organizing documents	980	490	0	490

TY 2011 Other Expenses Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 11000144

Software Version: 2011v1.2

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Office supplies, travel, other	8,332			8,332

TY 2011 Other Income Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 11000144

Software Version: 2011v1.2

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Foreign tax refunds-other	3,462	3,462	

TY 2011 Other Professional Fees Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment advisor fees	158,744	158,744	0	0

TY 2011 Taxes Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Property taxes	48	48		
Foreign taxes paid on investments	20,721	20,721		
Federal income/excise taxes	11,207			

Lola Wright Foundation

SUPPLEMENTAL SCHEDULE OF CONTRIBUTIONS

For the year ended December 31, 2011

Recipient	Date Paid	Purpose	Amount
Aids Services of Austin	5/16/2011	Computer & Tech Improvements	$ 10,000
American Red Cross of Central Texas	11/17/2011	Various items	18,800
Animal Trustees of Austin	11/17/2011	Technology Upgrade	4,705
Annunciation Maternity Home	5/16/2011	Phase I-III	12,000
Any Baby Can of Austin, Inc.	5/16/2011	Toward a van	25,000
Arc of the Capital Area	5/16/2011	Technology Upgrade	10,562
Austin Area Urban League, Inc.	11/17/2011	GED Testing	9,500
Austin Children's Museum	5/16/2011	Plotter, inks, paper	8,430
Austin Children's Shelter	5/16/2011	Sage MIP accounting software	10,000
Austin Community Foundation dba ACCESS News Program	5/16/2011	Fund program	15,000
Austin Free.net	11/17/2011	Mobile training lab	10,000
Austin Groups for the Elderly	11/17/2011	Toward a van	12,363
Austin Junior Forum	11/17/2011	Repair roof	5,500
Austin Learning Academy Family Learning Center	5/16/2011	Various items	5,000
Austin Summer Musical for Children	5/16/2011	Choreography, costumes and interactive performance	5,000
Austin YMBL Sunshine Camp	5/16/2011	Capital campaign	25,000
Avance, Inc	5/16/2011	Technology Upgrade	6,000
Bastrop County Womens Shelter	11/17/2011	Support crisis services	5,000
Big Brothers Big Sisters of Central Texas	11/17/2011	Update technology	7,500
Bookspring	11/17/2011	Books	7,500
Boys & Girls Clubs of Austin Area	11/17/2011	Passenger van	12,000
Boys & Girls Clubs Highland Lakes	11/17/2011	Used 15 passenger bus	12,000
Boys & Girls Clubs of South Central Texas	5/16/2011	Toward van	15,000
Camp Fire USA	5/16/2011	Whatever you wish	7,500
Candlelight Ranch Foundation	11/17/2011	Various items	5,000
Caritas of Austin	5/16/2011	Tilt top training tables & mesh guest chairs	15,000
Children's Medical Center Central Texas	11/17/2011	Expanding the center	36,000
Chisholm Trail Communities	5/16/2011	Portable aquatic lift	7,000

See accompanying independent auditors' report.

Sch. A

Grants

1/3

Lola Wright Foundation

SUPPLEMENTAL SCHEDULE OF CONTRIBUTIONS - CONTINUED

For the year ended December 31, 2011

Recipient	Date Paid	Purpose	Amount
Communities in Schools of Central Texas	5/16/2011	Tables and chairs	$ 17,000
Court Appointed Special Advocates of Travis County (CASA)	11/17/2011	Volunteer recruitment	5,000
Down Syndrome Association of Central Texas	5/16/2011	Equipment and software	3,100
Easter Seals Central Texas	11/17/2011	Bobcat and various items	25,500
El Buen Pastor Early Childhood Development Center	5/23/2011	Tuition Scholarships	15,000
El Buen Samaritano Episcopal Mission	11/17/2011	Technology building phase 1	14,732
Extend-A-Care, Inc.	5/16/2011	29 children for camp	25,607
Family Eldercare, Inc.	5/23/2011	Renovate restrooms to be handicap accessible	25,000
Foundation Communities, Inc.	5/23/2011	4/5 year old room	10,384
Georgetown Community Resource Center	11/17/2011	Honor Sandra O'Donnell for years of service	10,000
Georgetown Palace Theatre	5/16/2011	Inductive loop system and installation	5,000
Girlstart	11/17/2011	Various items	10,000
Goodwill Industries of Central Texas	11/17/2011	Various items	7,453
Greater East Austin Youth Association	5/23/2011	Sports equipment	25,000
Hays Caldwell Women's Center	11/17/2011	Equipment	7,500
Helping Hand Home for Children	5/23/2011	Computer servers and software	15,000
Helping the Aging Needy and Disabled	5/23/2011	Phone equipment	6,823
Huston-Tillotson University	5/23/2011	Renovation to cafeteria	40,000
Literacy Coalition of Central Texas	11/17/2011	Furniture and printing	4,500
Mainspring Schools	11/17/2011	Renovate vent a hood	1,810
Manos De Cristo, Inc.	5/23/2011	Computer equipment	10,000
Mary Lee Foundation	11/17/2011	Security camera system	5,683
Means and Wheels and More, Inc.	5/23/2011	Dishwashing machine	16,500
Mexic-Arte	5/16/2011	Website redesign	2,500
Mobile Loaves & Fishes, Inc.	5/23/2011	Food, toiletries and truck operating expenses	10,400
New Milestones Foundations	11/17/2011	Various items	10,000
North Austin Youth Association	11/17/2011	Concession cargo trailer	14,500
People's Community Clinic	11/17/2011	Server virtualization project	10,000

See accompanying independent auditors' report.

Lola Wright Foundation

SUPPLEMENTAL SCHEDULE OF CONTRIBUTIONS - CONTINUED

For the year ended December 31, 2011

Recipient	Date Paid	Purpose	Amount
Planned Parenthood of Texas - Capital Region	11/17/2011	Computer workstations	$ 20,000
Project Normalization Open Door Preschool	11/17/2011	Playground equipment	8,000
Project Transitions, Inc	11/17/2011	Various items	15,976
Raymond & Vivian Todd Award	11/17/2011	Quasi Endowment to assist Ronald McDonald House	100,000
Ronald McDonald House of Austin	11/17/2011	Expansion & operations of family room	10,000
Round Rock Caregivers (Faith in Action)	11/17/2011	Van	10,000
Safeplace	11/17/2011	Access & security for deaf clients	15,000
Seton Healthcare	5/23/2011	Digital mammography van	25,000
St Edwards University, Inc	5/23/2011	Toward construction of the south building	25,000
Texas Rio Grande Legal Aid, Inc	11/17/2011	Various items	4,614
The Austin Academy	11/17/2011	Computers, w/w, server	5,000
The Austin Tenants' Council	11/17/2011	Various items	8,079
The Settlement Home	11/17/2011	2 gently used minivans	36,000
Trinity Center	5/23/2011	Whatever you wish	10,500
United Way/Capital Area	5/23/2011	Annual fair share pledge	10,000
Vincare Services of Austin Foundation dba St Louise House	5/23/2011	Housing program expansion	7,500
Volunteer Council for the Austin State School	6/24/2011	Contribution towards buses	20,000
Waterloo Counseling Center, Inc.	5/16/2011	Capital items & equipment	4,500
Wesleyan Homes, Inc.	5/16/2011	Maintenance of Lola Wright garden	1,500
Wesleyan Homes, Inc.	11/17/2011	Restoration of scenic facility	12,500
Wildflower Donor, Inc.	5/16/2011	Computers	7,000
Wonders & Worries, Inc	5/16/2011	Play therapy supplies and equipment	10,000
Youth and Family Alliance dba LifeWorks	5/16/2011	Technology upgrade	15,000
Zilker Theatre Productions	11/17/2011	Sound board	24,000
			$ 1,081,521

See accompanying independent auditors' report.

PROPOSAL FACT SHEET

The **Proposal Fact Sheet** must accompany all proposals submitted to the Lola Wright Foundation. The board reviews proposals twice yearly; therefore, it is important that proposal submission deadlines are carefully observed. The Proposal Fact Sheet **should not exceed two pages.**

PROPOSAL FACT SHEET

Date:

1. Name of Agency

   Address

   Mailing address (if different)

   Project address (if different)

   Phone number; FAX number

   E-mail address

   Website address

   Executive Director: All relevant contact information

2. Brief History and Mission of the Agency
3. Date of Incorporation
4. Agency Services Provided
5. Agency staff -- Please list by position, with qualifications, salary, and benefits of all key paid staff. Also, give the total number of staff employed by the agency.
6. Population Served -- Please include current population served, number served per year, socioeconomic status, ethnicity, gender, age and special needs, if any.
7. Geographical Region Served
8. Total Agency Operating Budget for the Current Fiscal Year -- including all sources of income, plus a list of major contributors of $5,000 or more, by name and amount.

Lola Wright Foundation

Post Office Box 901
Austin, Texas 78767-9960

512-397-2717

Grant Application Guidelines

The Lola Wright Foundation limits its giving to 501(c) (3) non-profit organizations located in Texas and operating primarily within a 50-mile radius of Austin, Texas. It is the policy of the board of directors of the Foundation to make no grants to individuals or to organizations for the purpose of providing funds for day-to-day operating costs or expenses. Also, an organization receiving a grant from the Foundation may not apply for another grant for at least twelve (12) months.

The Lola Wright Foundation Board meets twice a year, usually in May and November, to consider grant requests. Completed grant requests must be received no later than **February 28th** (for May meeting) or **August 31st** (for November meeting). An item postmarked February 28th or August 31st, but received by us at a later date, **does not** constitute delivery to us by the deadline date. If the due date falls on a Saturday, Sunday or Holiday, then the **deadline date** shall be **the last working day prior to the due date**. **Late applications will not be reviewed or retained.**

Proposals may be mailed or delivered. No proposals will be accepted by e-mail or fax. If you find that by using U.S. Mail or other carriers, you cannot have your grant application in our hands by the deadline date of February 28th or August 31st, **you may hand-deliver** the application between the hours of 8:30 a.m. and 6:00 p.m., on any Monday through Friday (exclusive of holidays), **prior to the due date**. (See the Proposal Guidelines for delivery directions.)

To facilitate the grant application review process, the **Proposal Guidelines** must be followed, and a **Proposal Fact Sheet** must be completed by all applicants requesting funds from the Lola Wright Foundation. Items in the **Proposal Guidelines** and **Proposal Fact Sheet** must be included in each application as listed. **Proposals submitted without the requested information will not be considered.**

Please note: under **item N** of the **Proposal Guidelines**, only **one copy** of the materials requested should be provided.

PLEASE MAIL THE COMPLETED PROPOSAL TO:

Lola Wright Foundation
c/o US Trust
515 Congress Ave., 10th Floor
Austin, TX 78701

Questions about proposals and grants will be answered Monday through Friday at **512-397-2717 or 512-397-2001.**

7/21/09

SCH. B

0/4

Lola Wright Foundation

PROPOSAL GUIDELINES

The information listed below should be provided in the order presented and **should not exceed six (6) pages**. Each applicant should submit **nine (9) copies** (1 original and 8 copies) of the following:

A. Cover letter: (one page maximum, not counted in the 6-page limit)

B. Table of Contents: (one-page maximum, not counted in the 6-page limit)

C. Proposal Fact Sheet: (two-page maximum, not counted in the 6-page limit)

NOTE: Items **D through L must not exceed six (6) pages**. Please number each page.

D. Project Name: The name of the project.

E. Project Director: Please provide all relevant contact information.

F. Project Description: Describe the project, including a summary of the critical issues or opportunities it will address, its benefits to the community, and the changes or results the project will attain.

G. Project Cost: State the total cost of the project, the specific dollar amount requested from the Foundation, and the date payment is needed. **As an attachment under item M**, list all entities asked to give financial support to the proposed project. Please include their responses to date and dollar amounts committed. Also, include plans to support the project after the grant period.

If your request includes funds for construction of a new building, or improvements, renovation or repairs to an existing structure, please indicate whether you own the land and improvements or lease them. If the property is leased, please attach one copy of your current lease **under item N**.

H. Project Timeline: Include the beginning date, ending date, and key events. Please specify the timeframe when the funding requested from the Foundation would be spent.

I. Key Staff and Volunteers: List the names of key staff and volunteers involved with the project. Include brief background information and salaries of paid staff of the project.

J. Project Budget: Please include income and expenses. Specifically itemize the project budget showing how the funds requested from the Foundation will be used and identifying sources of revenue for other project expenses.

Bids for purchase of equipment and vehicles:
Provide at least **2 bids** for the purchase of equipment or vehicles. Consolidate supporting bid information onto one page and attach

as an appendix to this proposal **under item M,** if applicable.

K. Evaluation: Please include objective criteria to be used to determine project effectiveness or success. How will you know if the criteria are met?

L. Board Support: What percentage of the agency's board provided financial support to the organization in the most recent fiscal year? What was the total amount of financial support received from board members? Please indicate the year for which this information is provided.

M. Appendix: Only the items listed below may be attached in the appendix

Bids for the purchase of equipment or vehicles, if applicable (one page only)
List of Trustees or Directors and Corporate Officers: Please include board of director titles, profession, ethnicity, and gender.
All requests for funding to support project: List all entities asked to give financial support to the proposed project. Please include their responses to date and dollar amounts committed (see item G).

N. Additional Materials Required: (Provide only **one copy of each item**)

1. **Most recent copy of 501(c) (3) Tax-determination letter**
2. **Current audited financial report** (If you cannot furnish an audited statement then you must furnish a financial report signed by an officer of your organization certifying and attesting that the statement is a full and complete statement of your financial condition.
3. **Most recent IRS Informational Return Form 990**, if applicable
   If your organization does not have both of the above stated financial documents, submit the document you have and also submit a Balance Sheet along with an Income Statement for the most recently completed fiscal year.
4. **Accreditation certificate**, if applicable
5. **Copy of current lease**, if applicable (see item G)

MAKE CERTAIN THAT:

1. You have enclosed all information requested;
2. Your operating budget covers a full fiscal year;
3. You have broken down salaries and other benefits paid to your key staff;
4. You have prepared 1 original and 8 copies of the grant request;
5. You have not enclosed bulky materials, magazines, brochures, letters of recommendation, or any materials not requested in the **Proposal Guidelines**.