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INTERNAL REVENUE SERVICE

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

OMB No 1545-0052

2011

Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

For calendar year 2011 or tax year beginning

, and ending

Name of foundation CARL C ANDERSON AND MARIE JO ANDERSON CHARITABLE FOUNDATION		A Employer identification number 74-6078530
Number and street (or P O box number if mail is not delivered to street address) BANK OF AMERICA, N.A. P.O. BOX 831041	Room/suite	B Telephone number 800-357-7094
City or town, state, and ZIP code DALLAS, TX 75283-1041		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 61,898,536.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		6.	6.		STATEMENT 1
4 Dividends and interest from securities		1,801,811.	1,801,811.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		1,907,988.			
b Gross sales price for all assets on line 6a 46,723,533.					
7 Capital gain net income (from Part IV, line 2)			1,907,988.		
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)					
11 Other income					
12 Total. Add lines 1 through 11		3,709,805.	3,709,805.		
13 Compensation of officers, directors, trustees, etc		433,255.	80,872.		352,383.
14 Other employee salaries and wages		123,294.	0.		123,294.
15 Pension plans, employee benefits		75,229.	0.		75,229.
16a Legal fees					
b Accounting fees STMT 3		34,132.	0.		34,132.
c Other professional fees					
17 Interest					
18 Taxes STMT 4		110,341.	45,436.		26,537.
19 Depreciation and depletion		23,426.	0.		
20 Occupancy		39,215.	0.		39,215.
21 Travel, conferences, and meetings		13,031.	0.		13,031.
22 Printing and publications		1,316.	0.		1,316.
23 Other expenses STMT 5		394,015.	360,863.		33,152.
24 Total operating and administrative expenses. Add lines 13 through 23		1,247,254.	487,171.		698,289.
25 Contributions, gifts, grants paid		2,204,720.			2,204,720.
26 Total expenses and disbursements. Add lines 24 and 25		3,451,974.	487,171.		2,903,009.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		257,831.			
b Net investment income (if negative, enter -0-)			3,222,634.		
c Adjusted net income (if negative, enter -0-)				N/A	

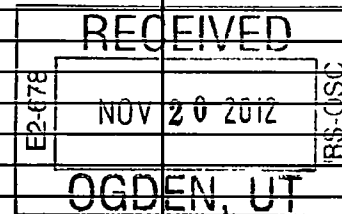
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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		45,312.	79,436.	79,436.
	2	Savings and temporary cash investments		2,212,442.	2,347,447.	2,347,561.
	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				
	7	Other notes and loans receivable ▶				
		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 STMT 9		26,201,066.	24,619,570.	27,730,821.
	b	Investments - corporate stock STMT 10		12,898,111.	12,405,157.	12,078,662.
	c	Investments - corporate bonds STMT 11		16,371,878.	18,846,720.	19,132,811.
	11	Investments - land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 12		536,832.	403,377.	523,643.	
14	Land, buildings, and equipment basis ▶ 45,513.					
	Less accumulated depreciation STMT 13 ▶ 42,041.		11,242.	3,472.	3,472.	
15	Other assets (describe ▶ SECURITY DEPOSIT)		2,800.	2,130.	2,130.	
16	Total assets (to be completed by all filers)		58,279,683.	58,707,309.	61,898,536.	
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				
	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		58,279,683.	58,707,309.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.		
29	Retained earnings, accumulated income, endowment, or other funds		0.	0.		
30	Total net assets or fund balances		58,279,683.	58,707,309.		
31	Total liabilities and net assets/fund balances		58,279,683.	58,707,309.		

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	58,279,683.
2	Enter amount from Part I, line 27a	2	257,831.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	249,649.
4	Add lines 1, 2, and 3	4	58,787,163.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	79,854.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	58,707,309.

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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 ATTACHMENT	P	VARIOUS	VARIOUS
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 46,723,533.			1,907,988.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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			1,907,988.
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	1,907,988.
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). If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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 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	3,735,499.	57,761,282.	.064671
2009	3,881,962.	53,183,299.	.072992
2008	4,783,120.	71,022,883.	.067346
2007	3,494,585.	84,584,980.	.041314
2006	2,849,420.	63,889,206.	.044599

2 Total of line 1, column (d)	2	.290922
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	.058184
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	64,129,766.
5 Multiply line 4 by line 3	5	3,731,326.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	32,226.
7 Add lines 5 and 6	7	3,763,552.
8 Enter qualifying distributions from Part XII, line 4 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.	8	2,924,398.

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Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see 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)		1	64,453.
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			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	64,453.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	64,453.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2011 estimated tax payments and 2010 overpayment credited to 2011	6a	10,632.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	42,000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	52,632.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	1,187.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	13,008.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2012 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>NM, TX</u>		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► BRADFORD H. ROBB Located at ► 114 W. 7TH STREET, SUITE 1200, AUSTIN, TX	Telephone no. ►	512-458-2285	
		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	N/A	
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> 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)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b	X
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years ►	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	2b	N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.)	3b	N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ 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 instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

7b

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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.

(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 STATEMENT 14		433,255.	52,958.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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
SHERRILL GERATY - 114 WEST 7TH STREET, SUITE 1200, AUSTIN, TX 78701	GRANT MANAGER 40.00	61,900.	13,257.	0.
CATHERINE SITTON - 114 WEST 7TH STREET, SUITE 1200, AUSTIN, TX 78701	GRANT MANAGER 40.00	61,900.	13,257.	0.

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

0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	61,377,667.
b	Average of monthly cash balances	1b	3,068,964.
c	Fair market value of all other assets	1c	659,730.
d	Total (add lines 1a, b, and c)	1d	65,106,361.
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	65,106,361.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	976,595.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	64,129,766.
6	Minimum investment return. Enter 5% of line 5	6	3,206,488.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	3,206,488.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	64,453.
b	Income tax for 2011. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	64,453.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	3,142,035.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	3,142,035.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	3,142,035.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	2,903,009.
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	21,389.
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	2,924,398.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,924,398.

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.

Form 990-PF (2011)

**CARL C ANDERSON AND MARIE JO ANDERSON
CHARITABLE FOUNDATION**

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				3,142,035.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			63,455.	
b Total for prior years:		0.		
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	0.			
4 Qualifying distributions for 2011 from Part XII, line 4: ▶ \$ 2,924,398.				
a Applied to 2010, but not more than line 2a			63,455.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2011 distributable amount				2,860,943.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
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		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2010. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012				281,092.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2007				
b Excess from 2008				
c Excess from 2009				
d Excess from 2010				
e Excess from 2011				

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

- 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling ▶
- b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see 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).)

NONE

- b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

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

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

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

**C & M ANDERSON CHARITABLE FOUNDATION, 512-458-2285
 114 W. 7TH STREET, SUITE 1200, AUSTIN, TX 78701**

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

CONTACT THE FOUNDATION OFFICE FOR CURRENT APPLICATION INFORMATION.

- c Any submission deadlines:

CONTACT THE FOUNDATION OFFICE FOR CURRENT INFORMATION.

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

CONTACT THE FOUNDATION OFFICE FOR CURRENT APPLICATION INFORMATION.

CARL C ANDERSON AND MARIE JO ANDERSON

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
UNIVERSITY OF NEW MEXICO FOUNDATION 2 WOODWARD COURT NE ALBUQUERQUE, NM 87102		PUBLIC CHARITY	FOR HEALING GARDENS & POOL RADIOSURGERY SUITE	600,000.
HOPE CENTER FOR EDMOND, INC. 1251 N. BROADWAY #A EDMOND, OK 73003		PUBLIC CHARITY	2011 GIFT FOR 2011 SCHOOL SUPPLY/BACKPACK PROGRAM	5,000.
THE FAMILY YMCA 1450 IRIS STREET LOS ALAMOS, NM 87544		PUBLIC CHARITY	FOR 6 COMPUTERS FOR GRADUATE NM PROGRAM	5,220.
CUIDANDO LOS NINOS 1500 WALTER STREET SE ALBUQUERQUE, NM 87102		PUBLIC CHARITY	FOR GENERAL OPERATIONS	20,000.
THE CHILDREN'S CENTER, INC. 4001 MONTGOMERY BLVD NE ALBUQUERQUE, NM 87109		PUBLIC CHARITY	FOR EQUIPMENT PURCHASE	15,000.
Total	SEE CONTINUATION SHEET(S) ▶ 3a			2,204,720.
b Approved for future payment				
NONE				
Total				0.

Enter gross amounts unless otherwise indicated.

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

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CARL C ANDERSON AND MARIE JO ANDERSON
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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
CHRISTIAN SENIOR SERVICES 4306 NORTHWEST INTERSTATE 410 LOOP FRONTAGE ROAD SAN ANTONIO, TX 78229		PUBLIC CHARITY	VANS FOR GRACE PLACE	20,000.
CENTRAL TEXAS CHILDREN'S HOME 13200 CRANE ROAD BUDA, TX 78610		PUBLIC CHARITY	FOR GENERAL OPERATIONS	20,000.
HOPE HOUSE CASA ESPERANZA 1005 YALE NE ALBUQUERQUE, NM 87106		PUBLIC CHARITY	FOR NEW HVAC	15,000.
AMERICAN RED CROSS/DALLAS AREA 4800 HARRY HINES BLVD DALLAS, TX 75235		PUBLIC CHARITY	FOR LIFETIME PROGRAM	15,000.
A NEW DAY YOUTH AND FAMILY SERVICES 1330 SAN PEDRO NE SUITE 201-B ALBUQUERQUE, NM 87110		PUBLIC CHARITY	FOR GENERAL OPERATIONS	10,000.
FOSTER ANGELS OF CENTRAL TEXAS P.O. BOX 152575 AUSTIN, TX 78715		PUBLIC CHARITY	FOR SMALL GRANTS PROGRAM	5,000.
LABOR OF LOVE: THE ATHENS SAMARITANS P.O. BOX 350 ATHENS, TX 75751		PUBLIC CHARITY	FOR HOME REPAIRS FOR HANDICAPPED & THE INDIGENT ELDERLY	5,000.
ROUND ROCK POLICE DEPARTMENT 2701 NORTH MAYS STREET ROUND ROCK, TX 78665		PUBLIC CHARITY	FOR 2011 XMAS PROGRAM	1,000.
NEW MEXICO COMMUNITY FOUNDATION 502 WEST CORDOVA ROAD SANTA FE, NM 87505		PUBLIC CHARITY	FOR GENERAL SMALL GRANTS PROGRAM	5,000.
NEW MEXICO COLLABORATION TO END HUNGER 2340 ALAMO AVENUE SE SUITE 101 ALBUQUERQUE, NM 87106		PUBLIC CHARITY	FOR SUMMER FOOD PROGRAM	30,000.
Total from continuation sheets				1,559,500.

**CARL C ANDERSON AND MARIE JO ANDERSON
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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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)				
FORT SUMNER COMMUNITY DEVELOPMENT INC. 762 N 4TH STREET FORT SUMNER, NM 88119		PUBLIC CHARITY	HELPING HANDS FOR SENIOR CITIZENS	5,000.
FOR THE CHILDREN P.O. BOX 29346 AUSTIN, TX 78755		PUBLIC CHARITY	FOR SCHOOL SUPPLIES PROGRAM	1,500.
THE STOREHOUSE 106 BROADWAY BLVD SE ALBUQUERQUE, NM 87102		PUBLIC CHARITY	FOR GENERAL OPERATIONS	30,000.
TEXAS CHILDREN'S HOSPITAL (BAYLOR) 1919 S. BRAESWOOD MC4-4483 HOUSTON, TX 77030		PUBLIC CHARITY	FOR PED. BRAIN TUMOR RESEARCH (DR. PARSON)	20,000.
TEXAS CHILDREN'S HOSPITAL (BAYLOR) 1919 S. BRAESWOOD MC4-4483 HOUSTON, TX 77030		PUBLIC CHARITY	RESEARCH FOR THERAPY FOR BRAIN CANCERS/NEUROBLASTOMA (DR. LOUIS)	20,000.
TEXAS CHILDREN'S HOSPITAL (BAYLOR) 1919 S. BRAESWOOD MC4-4483 HOUSTON, TX 77030		PUBLIC CHARITY	PED. BRAIN TUMORS/BONE CANCER RESEARCH	10,000.
TEXAS CHILDREN'S HOSPITAL (BAYLOR) 1919 S. BRAESWOOD MC4-4483 HOUSTON, TX 77030		PUBLIC CHARITY	FOR TARGETED THERAPY, LYMPHOMA (DR. BOLLARD)	10,000.
REACH UNLIMITED 12777 JONES ROAD SUITE 103 HOUSTON, TX 77070		PUBLIC CHARITY	FOR GENERAL OPERATIONS	15,000.
MAVERICK BOYS & GIRLS CLUB OF AMARILLO 1923 SOUTH LINCOLN STREET AMARILLO, TX 79109		PUBLIC CHARITY	FOR SCHOLARSHIP PROGRAM	10,000.
HUMBLE AREA ASSISTANCE MINISTRIES P.O. BOX 14051 HUMBLE, TX 77347		PUBLIC CHARITY	FOR BASIC NEEDS PROGRAMS FOR CHILDREN	10,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
PORT SUMNER COMMUNITY DEVELOPMENT 762 N 4TH STREET PORT SUMNER, NM 88119		PUBLIC CHARITY	HELPING HANDS FOR SENIOR CITIZENS	10,000.
TEXAS CHILDREN'S HOSPITAL (BAYLOR) 1919 S. BRAESWOOD MC4-4483 HOUSTON, TX 77030		PUBLIC CHARITY	NEUROBLASTOMA/BRAIN CANCER RESEARCH (DR. SHOHET)	20,000.
TEXAS CHILDREN'S HOSPITAL (BAYLOR) 1919 S. BRAESWOOD MC4-4483 HOUSTON, TX 77030		PUBLIC CHARITY	RESEARCH ON BONE CANCER/OSTEOSARCOMA (DR. YUSTEIN)	20,000.
LA VIDA FELICIDAD 530 SUN RANCH VILLAGE ROAD LOS LUNAS, NM 87031		PUBLIC CHARITY	FOR HOMECARE/PERSONAL CARE PROGRAM	20,000.
SUNSHINE INDUSTRIES, INC. 500 PARK STREET SOUTHWEST ARDMORE, OK 73401		PUBLIC CHARITY	FOR SUNSHINE ADULT DAY SERVICES	15,000.
SPIRITHORSE THERAPEUTIC RIDING CENTER 1960 POST OAK DRIVE CORINTH, TX 76210		PUBLIC CHARITY	FOR DISABILITIES PROJECT	20,000.
HILL COUNTRY DAILY BREAD MINISTRIES 140 INDUSTRIAL DRIVE BOERNE, TX 78006		PUBLIC CHARITY	FOR FAMILY MENTOR RESOURCE PROGRAM EXPANSION	15,000.
TRIPLE H EQUITHERAPY CENTER 791 BACKHAUS ROAD PIPE CREEK, TX 78063		PUBLIC CHARITY	FOR RIDING TO INDEPENDENCE PROGRAM	5,000.
DREAM A DREAM THERAPEUTIC HORSEMANSHIP 23650 ROUND MOUNTAIN CIRCLE LEANDER, TX 78641		PUBLIC CHARITY	FOR SCHOLARSHIP PROGRAM	3,500.
AUSTIN COMMUNITY FOUNDATION P.O. BOX 5159 AUSTIN, TX 78767		PUBLIC CHARITY	FOR SCHOOL SUPPORT FUND	12,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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)				
TEXAS RAMP PROJECT P.O. BOX 832065 RICHARDSON, TX 75083		PUBLIC CHARITY	FOR RAMP EXPANSION PROGRAM IN OKLAHOMA	5,000.
HORSIN AROUND THERAPEUTIC RIDING CENTER 1032 JOHN CARTER ROAD BLOOMINGDALE, GA 31302		PUBLIC CHARITY	SCHOLARSHIP PROGRAM FOR CHILDREN & ADULTS WITH DISABILITIES	3,000.
UT SOUTHWESTERN MEDICAL SCHOOL 5323 HARRY HINES BLVD DALLAS, TX 75390		PUBLIC CHARITY	PHOSPHATIDYLSERINE AS A TARGET FOR CANCER THERAPY	25,000.
UNIVERSITY OF TEXAS 1 UNIVERSITY STATION AUSTIN, TX 78712		PUBLIC CHARITY	NEURAL STEM CELL MODULATION/LUNG TISSUE FOR VASCULARIZED TISSUE SCAFFOLDS	50,000.
UT SOUTHWESTERN MEDICAL SCHOOL 5323 HARRY HINES BLVD DALLAS, TX 75390		PUBLIC CHARITY	MOLECULAR SIGNATURES FOR HUMAN CANCER TO PROVIDE NEW METHODS FOR DIAGNOSIS AND TREATMENT	25,000.
CLOVIS MEALS ON WHEELS P.O. BOX 371 CLOVIS, NM 88101		PUBLIC CHARITY	FOR GENERAL OPERATIONS	5,000.
MEMORIAL HERMANN FOUNDATION 929 GESSNER, SUITE 2650 HOUSTON, TX 77024		PUBLIC CHARITY	FOR MEDICAL RESEARCH (ENHANCED DC IMMUNOTHERAPY)	75,000.
AUSTIN CHILDREN'S SHELTER 4800 MANOR ROAD AUSTIN, TX 78723		PUBLIC CHARITY	FOR HEALTHY KID'S PROGRAM	50,000.
TEXAS RAMP PROJECT P.O. BOX 832065 RICHARDSON, TX 75083		PUBLIC CHARITY	MATCHING GRANT FUNDS (TEXAS EXPANSION)	10,000.
NEW MEXICO COMMUNITY FOUNDATION 502 WEST CORDOVA ROAD SANTA FE, NM 87505		PUBLIC CHARITY	FOR NM FIRE DISASTER RELIEF 2011	5,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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)				
MEALS ON WHEELS OF ALBUQUERQUE 5901 HARPER DRIVE NORTHEAST ALBUQUERQUE, NM 87109		PUBLIC CHARITY	LOW INCOME MEDICAL MEALS PROGRAM	25,000.
AMERICAN RED CROSS OF CENTRAL OKLAHOMA 142 MONROE STREET NORTHEAST ALBUQUERQUE, NM 87108		PUBLIC CHARITY	2011 DISASTER RELIEF, OK TORNADO VICTIMS	5,000.
ANIMAL HUMANE, NEW MEXICO 615 VIRGINIA STREET SOUTHEAST ALBUQUERQUE, NM 87108		PUBLIC CHARITY	FOR PET OWNERSHIP PROGRAM FOR PERSONS OVER 60	5,000.
FOOD BANK OF THE GOLDEN CRESCENT 3809 EAST RIO GRANDE STREET VICTORIA, TX 77901		PUBLIC CHARITY	FOR FOOD RESCUE PROGRAM	5,000.
THE CRISIS CENTER 577 EL LLANO ESPANOLA, NM 87532		PUBLIC CHARITY	CHILDREN & INFANTS PROGRAM AT ANGEL HOUSE	5,000.
JUNIOR LEAGUE OF AUSTIN 5416 PARKCREST SUITE 100 AUSTIN, TX 78731		PUBLIC CHARITY	FOR F.I.T. PROGRAM BATY ELEMENTARY	25,000.
THERAPY PET PALS OF TEXAS, INC. 3930 BEE CAVE ROAD, SUITE C AUSTIN, TX 78746		PUBLIC CHARITY	PET VISITATION PROGRAM	5,000.
JEWISH FAMILY SERVICE, NEW MEXICO 5520 WYOMING BOULEVARD, STE 200 ALBUQUERQUE, NM 87109		PUBLIC CHARITY	AGING WELL AT HOME PROGRAM	30,000.
SHRINERS HOSPITALS FOR CHILDREN-GALVESTON 815 MARKET STREET GALVESTON, TX 77550		PUBLIC CHARITY	STEM CELL DERIVED CUSTOM SKIN FOR BURN OR TRAUMA PATIENTS	75,000.
MARY LEE FOUNDATION 1339 LAMAR SQUARE DRIVE AUSTIN, TX 78704		PUBLIC CHARITY	MLF FOOD PANTRY	10,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
EASTER SEALS OF GREATER HOUSTON 4500 BISSONNET SUITE 340 BELLAIRE, TX 77401		PUBLIC CHARITY	TOY/TECH LENDING LIBRARY & PLAY THERAPY PROGRAM	10,000.
AUSTIN GROUPS FOR THE ELDERLY 3710 CEDAR STREET #155 AUSTIN, TX 78705		PUBLIC CHARITY	ELDERHAVEN & WILLIAMSON CO ADULT DAY	10,000.
REGIONAL FOOD BANK OF OKLAHOMA 3355 S. PURDUE STREET OKLAHOMA CITY, OK 73137		PUBLIC CHARITY	FOOD 4 KIDS PROGRAM	10,000.
SUNBEAM FAMILY SERVICES 616 NW 21ST STREET OKLAHOMA CITY, OK 73103		PUBLIC CHARITY	CAREGIVER FUNDAMENTALS/RESPITE PROGRAM	10,000.
FAMILY ELDERCARE 221-HANCOCK DRIVE AUSTIN, TX 78756		PUBLIC CHARITY	FOR CAPITAL CAMPAIGN	50,000.
COMMUNITY PARTNERS OF DALLAS 1215 SKILES STREET DALLAS, TX 75204		PUBLIC CHARITY	FOR KIDS IN CRISIS PROGRAM	10,000.
NORTHWEST ASSISTANCE MINISTRIES 1555 KUYKENDAHL ROAD HOUSTON, TX 77090		PUBLIC CHARITY	FUNDING FOR THE CHILDREN'S CLINIC	20,000.
BATTERED WOMEN'S FOUNDATION P.O. BOX 54888 HURST, TX 76054		PUBLIC CHARITY	CHILDREN'S PROGRAMS FOR DOMESTIC VIOLENCE SUPPORT CENTER	10,000.
SHARE YOUR CARE ADULT DAY SERVICES 2601 WYOMING BOULEVARD ALBUQUERQUE, NM 87112		PUBLIC CHARITY	ALIVO CAREGIVER SUPPORT PROGRAM	20,000.
EASTER OKLAHOMA DONATED DENTAL SERVICES 3741 SOUTH PEORIA AVENUE TULSA, OK 74105		PUBLIC CHARITY	FOR GENERAL OPERATIONS	20,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
SAFEPLACE P.O. BOX 19454 AUSTIN, TX 78760		PUBLIC CHARITY	FOR CHILDREN'S PROGRAMS	10,000.
AUSTIN COMMUNITY FOUNDATION P.O. BOX 5159 AUSTIN, TX 78767		PUBLIC CHARITY	2011 TEXAS FIRE RELIEF FUND	20,000.
LIFE SENIOR SERVICES 5950 E. 31ST STREET TULSA, OK 74135		PUBLIC CHARITY	ADULT DAY SERVICES FOR LOW-INCOME SENIORS	25,000.
AUSTIN COMMUNITY FOUNDATION P.O. BOX 5159 AUSTIN, TX 78767		PUBLIC CHARITY	2011 TEXAS FIRE RELIEF FUND (JB DISCRETIONARY)	17,000.
GOOD SHEPHERD CENTER P.O. BOX 749 ALBUQUERQUE, NM 87103		PUBLIC CHARITY	FOR GENERAL OPERATIONS	40,000.
TEXAS SCHOOL FOR THE DEAF FOUNDATION P.O. BOX 42727 AUSTIN, TX 78704		PUBLIC CHARITY	LANGUAGE FOR ALL CAMPAIGN (MATCHING FUNDS)	5,000.
ASSOCIATION OF SMALL FOUNDATIONS 1720 N. STREET NORTHWEST WASHINGTON, DC 20036		PUBLIC CHARITY	FOR GENERAL OPERATIONS GRANT	1,000.
THE SALVATION ARMY - ALBUQUERQUE 700 LOMAS BLVD NE #108, 2 WOODLAND CENTER ALBUQUERQUE, NM 87102		PUBLIC CHARITY	FOR DIRECT ASSISTANCE PROGRAM	30,000.
STARRY, INC. 1301 N. MAYS ST ROUND ROCK, TX 78664		PUBLIC CHARITY	FOR EMERGENCY SHELTER	25,000.
THE SALVATION ARMY - AUSTIN 501 E. 8TH STREET, P.O. BOX 1000 AUSTIN, TX 78767		PUBLIC CHARITY	FOR KID CARE CONNECTION	25,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
DOWN HOME RANCH 20250 FM 619 ELGIN, TX 78621		PUBLIC CHARITY	FOR GENERAL OPERATIONS	25,000.
FAMILY ELDERCARE 221-HANCOCK DRIVE AUSTIN, TX 78756		PUBLIC CHARITY	FOR IN-HOME CARE/BILL PAYER PROGRAMS	25,000.
ALL FAITHS RECEIVING HOME 3001 TRELLIS DRIVE NORTHWEST ALBUQUERQUE, NM 87107		PUBLIC CHARITY	LA SOLANA DEL VALLE DAY (FOR GENERAL OPERATIONS)	10,000.
GRAND PRARIE WELLNESS CENTER 1710 SMALL STREET GRAND PRAIRIE, TX 75050		PUBLIC CHARITY	FOR CHILDREN'S PROGRAM/FAMILY MEDICAL CLINIC	15,000.
TOYS FOR TOTS - TULSA 1101 N. 6TH STREET BROKEN ARROW, OK 74012		PUBLIC CHARITY	FOR 2011 XMAS PROGRAM	1,000.
TOYS FOR TOTS - NM 400 WYOMING BLVD. NE ALBUQUERQUE, NM 87123		PUBLIC CHARITY	FOR 2011 XMAS PROGRAM	1,500.
TOYS FOR TOTS - OK 5316 SOUTH DOUGLAS BLVD OKLAHOMA CITY, OK 73150		PUBLIC CHARITY	FOR 2011 XMAS PROGRAM	1,000.
AUSTIN COMMUNITY FOUNDATION 4315 GUADALUPE STREET #300 AUSTIN, TX 78751		PUBLIC CHARITY	FOR 2011 SEASON FOR CARING PROJECT	1,500.
SALVATION ARMY - AUSTIN 501 E. 8TH STREET, P.O. BOX 1000 AUSTIN, TX 78767		PUBLIC CHARITY	FOR 2011 ANGEL TREE XMAS PROJECT	1,500.
TRAVIS COUNTY BROWN SANTA PROGRAM P.O. BOX 207 AUSTIN, TX 78767		PUBLIC CHARITY	FOR 2011 CHRISTMAS PROGRAM	1,500.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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)				
RONALD MCDONALD HOUSE CHARITIES OF NEW MEXICO 1011 YALE BLVD. NE ALBUQUERQUE, NM 87106		PUBLIC CHARITY	FOR HOUSE LODGING PROGRAM	5,000.
BLUE SANTA - SAN MARCOS 630 E. HOPKINS SAN MARCOS, TX 78666		PUBLIC CHARITY	FOR BLUE SANTA PROGRAM	1,750.
GREATER SAN MARCOS YOUTH COUNCIL P.O. BOX 1455 SAN MARCOS, TX 78667		PUBLIC CHARITY	FOR GENERAL OPERATIONS	5,000.
AUSTIN POLICE - OPERATION BLUE P.O. BOX 689001 AUSTIN, TX 78768		PUBLIC CHARITY	FOR 2011 CHRISTMAS PROGRAM	1,500.
CHILDREN'S GRIEF CENTER OF NEW MEXICO, INC. 3001 TRELIS NW ALBUQUERQUE, NM 87107		PUBLIC CHARITY	FOR GENERAL OPERATIONS	5,000.
PB&J FAMILY SERVICES 1101 LOPEZ ROAD SOUTHWEST ALBUQUERQUE, NM 87105		PUBLIC CHARITY	FOR THERAPEUTIC PRESCHOOL PROGRAM	5,000.
ALBUQUERQUE HEALTH CARE FOR THE HOMELESS, INC. P.O. BOX 25445 ALBUQUERQUE, NM 87125		PUBLIC CHARITY	FOR CON NINOS PROGRAM	5,000.
HILL COUNTRY FAITH MINISTRIES 1401 DAVIS LANE SAN MARCOS, TX 78666		PUBLIC CHARITY	FOR 2011 CHRISTMAS PROGRAM/BETH SHALOM MINISTRIES	2,500.
HILL COUNTRY DAILY BREAD MINISTRIES 140 INDUSTRIAL DRIVE BOERNE, TX 78006		PUBLIC CHARITY	FOR GENERAL OPERATIONS	5,000.
ARCA 11300 LOMAS NE ALBUQUERQUE, NM 87112		PUBLIC CHARITY	FOR HEALTH & WELLNESS PROGRAM	5,000.
Total from continuation sheets				

CARL C ANDERSON AND MARIE JO ANDERSON
CHARITABLE FOUNDATION

74-6078530

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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)				
ARCA 11300 LOMAS NE ALBUQUERQUE, NM 87112		PUBLIC CHARITY	FOR FAMILY LIVING SERVICES	10,000.
SPECIAL CARE, INC. 12201 N. WESTERN AVE. OKLAHOMA CITY, OK 73114		PUBLIC CHARITY	FOR GENERAL OPERATIONS	20,000.
MEALS ON WHEELS AND MORE 3227 E. 5TH STREET AUSTIN, TX 78702		PUBLIC CHARITY	FOR GENERAL OPERATIONS	30,000.
MEALS ON WHEELS PLUS 717 NORTH 10TH STREET ABILENE, TX 79601		PUBLIC CHARITY	GROCERIES ON WHEELS PROGRAM	15,000.
BRAZORIA COUNTY ASSOCIATION 120 E. HOSPITAL DRIVE ANGLETON, TX 77515		PUBLIC CHARITY	FOR ECI PROGRAM	10,000.
THE VILLAGE LEARNING & ACHIEVEMENT CENTER 3819 PLUM VALLEY DRIVE KINGWOOD, TX 77339		PUBLIC CHARITY	FOR GENERAL OPERATIONS	15,000.
OKLAHOMA FOUNDATION 8421 N. WALKER AVE. OKLAHOMA CITY, OK 73114		PUBLIC CHARITY	FOR SCHOLARSHIP INITIATIVE	10,000.
MEALS ON WHEELS AND MORE 3227 E. 5TH STREET AUSTIN, TX 78702		PUBLIC CHARITY	MEALS FOR KIDS	25,000.
A NEW LEAF 2306 SOUTH 1ST PLACE BROKEN ARROW, OK 74012		PUBLIC CHARITY	CVST PROGRAM	10,000.
FULL CIRCLE SENIOR ADULT DAY CENTER 1304 LINDSEY PLAZA DRIVE NORMAN, OK 73071		PUBLIC CHARITY	FOR GENERAL OPERATIONS	10,000.
Total from continuation sheets				

CARL C ANDERSON AND MARIE JO ANDERSON
CHARITABLE FOUNDATION

74-6078530

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
ALTA MIRA SPECIALIZED FAMILY 1605 CARLISLE BLVD. NE ALBUQUERQUE, NM 87110		PUBLIC CHARITY	FOR ECI PROGRAM	20,000.
BROWN SANTA - HAYS COUNTY P.O. BOX 1475 SAN MARCOS, TX 78667		PUBLIC CHARITY	FOR BROWN SANTA PROGRAM	1,750.
ADELANTE DEVELOPMENT CENTER, INC. 3900 OSUNA ROAD NE ALBUQUERQUE, NM 87109		PUBLIC CHARITY	FOR GENERAL OPERATIONS	5,000.
ANY BABY CAN 1121 E. 7TH STREET AUSTIN, TX 78702		PUBLIC CHARITY	FOR GENERAL OPERATIONS	25,000.
ALBUQUERQUE CHRISTIAN CHILDREN'S HOME, INC. 5700 WINTER HAVEN ROAD NW ALBUQUERQUE, NM 87120		PUBLIC CHARITY	MATCHING FUNDS, ANNUAL FUNDRAISER	20,000.
Total from continuation sheets				

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
INTEREST INCOME- BANK OF AMERICA	6.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	6.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
ACCRUED MARKET DISCOUNT INTEREST	3,802.	0.	3,802.
DIVIDEND INCOME- BANK OF AMERICA	1,068,388.	0.	1,068,388.
INTEREST INCOME- BANK OF AMERICA	729,621.	0.	729,621.
TOTAL TO FM 990-PF, PART I, LN 4	1,801,811.	0.	1,801,811.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEE	3,360.	0.		3,360.
PAYROLL FEES	6,322.	0.		6,322.
ACCOUNTING	24,450.	0.		24,450.
TO FORM 990-PF, PG 1, LN 16B	34,132.	0.		34,132.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	26,090.	26,090.		0.
FOREIGN TAXES ON QUALIFIED	13,370.	13,370.		0.
FOREIGN TAXES ON NON-QUALIFIED	5,976.	5,976.		0.
EMPLOYER FICA/MEDICARE	26,537.	0.		26,537.
EXCISE TAX	38,368.	0.		0.
TO FORM 990-PF, PG 1, LN 18	110,341.	45,436.		26,537.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
WEBSITE CONTRACT/ MAINT.	3,993.	0.		3,993.
OTHER MISC. EXPENSE	150.	0.		150.
INSURANCE EXPENSE	9,344.	0.		9,344.
OFFICE EXPENSE	13,003.	0.		13,003.
ASSOCIATION MEMBERSHIP FEES	731.	0.		731.
OTHER INVESTMENT FEES	5,740.	5,740.		0.
SOFTWARE EXPENSE	1,019.	0.		1,019.
MOVING EXPENSE	4,812.	0.		4,812.
ADVISORY FEES - INVESTMENT	355,123.	355,123.		0.
STATE FILING FEE	100.	0.		100.
TO FORM 990-PF, PG 1, LN 23	394,015.	360,863.		33,152.

FOOTNOTES

STATEMENT 6

FORM 990-PF - PART VIII, LINE 1(B)-
AVERAGE HOURS PER WEEK DEVOTED TO POSITION:

THE COMPENSATION SHOWN ON THE RETURN THAT IS PAID TO BANK OF AMERICA, N.A. AS A CORPORATE TRUSTEE IS NOT CALCULATED BASED UPON AN HOURLY RATE FOR TIME SPENT BY THE TRUSTEE; RATHER, BANK OF AMERICA'S COMPENSATION AS CORPORATE TRUSTEE IS CALCULATED USING A MARKET VALUE FEE SCHEDULE. THE TRUST OFFICER'S TIME SPENT PERFORMING ADMINISTRATIVE RESPONSIBILITIES FOR THIS FOUNDATION AVERAGES ONE HOUR PER WEEK. IN ADDITION, TIME IS SPENT BY OTHER STAFF MEMBERS FOR RECORDKEEPING, INVESTMENT MANAGEMENT, INCOME COLLECTION, RENDERING STATEMENTS AND ACCOUNTINGS, REGULATORY REPORTING, REGULATORY COMPLIANCE, AND TAX SERVICES.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	7
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DESCRIPTION	AMOUNT
NONDIVIDEND DISTRIBUTION	6,606.
TIMING-FACTORED INCOME - 2010	21,870.
YEAR-END TRADES - 2011	199,956.
ACCRUED INTEREST PAID 2010	6,515.
NONDEDUCTIBLE TRUST EXPENSES	1,007.
UNCLEARED CHECKS	13,695.
TOTAL TO FORM 990-PF, PART III, LINE 3	249,649.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
TIMING NET COST BASIS ADJ.	4,993.
TIMING-FACTORED INCOME - 2011	32,825.
YEAR-END TRADES - 2010	960.
ACCRUED INTEREST PAID 2011	1,038.
NET TIMING DIFFERENCE	40,038.
TOTAL TO FORM 990-PF, PART III, LINE 5	79,854.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	9
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U.S. GOVERNMENT SECURITIES	X		24,619,570.	27,730,821.
TOTAL U.S. GOVERNMENT OBLIGATIONS			24,619,570.	27,730,821.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			24,619,570.	27,730,821.

FORM 990-PF	CORPORATE STOCK	STATEMENT 10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	12,405,157.	12,078,662.
TOTAL TO FORM 990-PF, PART II, LINE 10B	12,405,157.	12,078,662.

FORM 990-PF	CORPORATE BONDS	STATEMENT 11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	18,846,720.	19,132,811.
TOTAL TO FORM 990-PF, PART II, LINE 10C	18,846,720.	19,132,811.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 12
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
REAL ESTATE INVESTMENTS	COST	358,789.	410,362.
COMMODITIES	COST	44,587.	113,081.
MINERAL INTERESTS	COST	1.	200.
TOTAL TO FORM 990-PF, PART II, LINE 13		403,377.	523,643.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT 13
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
BREAKROOM TABLE SE	317.	316.	1.
FILE CABINET	420.	410.	10.
FURNITURE & FIXTURES	5,684.	3,857.	1,827.
BIZ PHONE SYSTEM	2,093.	2,093.	0.
LANIER DIG LD122 C	5,092.	5,092.	0.
COMPUTER	4,738.	4,423.	315.
PRINTER	1,463.	1,414.	49.
COMPUTER	2,400.	1,800.	600.
OFFICE APPLIANCE	318.	207.	111.

COMPUTER	1,599.	1,040.	559.
DESK-SHERRILL	3,004.	3,004.	0.
DESK-CATE	3,222.	3,222.	0.
DESK-BRAD	3,649.	3,649.	0.
DESK-JENNIFER	3,145.	3,145.	0.
CONFERENCE TABLE	2,390.	2,390.	0.
LOVE SEAT-BRAD	1,750.	1,750.	0.
RECEPTION CHAIRS	2,630.	2,630.	0.
COMPUTER-BRAD	1,599.	1,599.	0.
TOTAL TO FM 990-PF, PART II, LN 14	45,513.	42,041.	3,472.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 14
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JENNIFER BIRD 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	TRUSTEE/CHAIRMAN OF THE BOARD 30.00	65,000.	11,942.	0.
R. RUSSELL RAGER 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	TRUSTEE 5.00	30,000.	0.	0.
CARL C. ANDERSON III 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	TRUSTEE 5.00	15,711.	5,000.	0.
BRADFORD H. ROBB 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	EXECUTIVE DIRECTOR 40.00	188,238.	36,016.	0.
BANK OF AMERICA, N.A. P.O. BOX 831041 DALLAS, TX 75283	TRUSTEE 1.00	134,306.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		433,255.	52,958.	0.

Depreciation and Amortization 990-PF
 (Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172

2011

Attachment
 Sequence No **179**

Name(s) shown on return

**CARL C ANDERSON AND MARIE JO ANDERSON
 CHARITABLE FOUNDATION**

Business or activity to which this form relates

FORM 990-PF PAGE 1

Identifying number

74-6078530

Part I Election To Expense Certain Property Under Section 179 Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	500,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	2,000,000.
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2010 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2012. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	21,389.
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2011	17	2,037.
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/>		

Section B - Assets Placed in Service During 2011 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property	/		27.5 yrs.	MM	S/L	
	/		27.5 yrs.	MM	S/L	
i Nonresidential real property	/		39 yrs.	MM	S/L	
	/			MM	S/L	

Section C - Assets Placed in Service During 2011 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year	/		40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr	22	23,426.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

CARL C ANDERSON AND MARIE JO ANDERSON
CHARITABLE FOUNDATION

Form 4562 (2011)

74-6078530 Page 2

Part V Listed Property (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.)

Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles)

24a Do you have evidence to support the business/investment use claimed? <input type="checkbox"/> Yes <input type="checkbox"/> No					24b If "Yes," is the evidence written? <input type="checkbox"/> Yes <input type="checkbox"/> No				
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost	
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use							25		
26 Property used more than 50% in a qualified business use:									
		%							
		%							
		%							
27 Property used 50% or less in a qualified business use:									
		%				S/L -			
		%				S/L -			
		%				S/L -			
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1							28		
29 Add amounts in column (i), line 26. Enter here and on line 7, page 1								29	

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person.

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle		(b) Vehicle		(c) Vehicle		(d) Vehicle		(e) Vehicle		(f) Vehicle	
30 Total business/investment miles driven during the year (do not include commuting miles)												
31 Total commuting miles driven during the year												
32 Total other personal (noncommuting) miles driven												
33 Total miles driven during the year. Add lines 30 through 32												
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use?												

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use?		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles

Part VI Amortization

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2011 tax year:					
43 Amortization of costs that began before your 2011 tax year					43
44 Total. Add amounts in column (f). See the instructions for where to report					44

FROM 01/01/2011
TO 12/31/2011

BANK OF AMERICA, NA
STATEMENT OF CAPITAL GAINS AND LOSSES
CARL C ANDERSON SR & MARIE JO ANDERSON
CHARITABLE FOUNDATION
TRUST YEAR ENDING 12/31/2011

PAGE 950

RUN 04/05/2012
03:45:50 PM

TAX PREPARER: 811
TRUST ADMINISTRATOR: 345
INVESTMENT OFFICER: 92

LEGEND: F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM	NC
194.0000 TYCO INTL LTD NEW F COM - H89128104 - MINOR = 3162							
SOLD		03/01/2011	8753 81				
ACQ	194.0000	12/11/2009	8753 81	7094.58	SUB TRUST 033001589639	LT15 Y	
280.0000 TYCO INTL LTD NEW F COM - H89128104 - MINOR = 3162							
SOLD		03/01/2011	12634 36				
ACQ	280.0000	10/21/2009	12634.36	9944.84	SUB TRUST 033001589639	LT15 Y	
29.0000 MILLICOM INT'L CELLULAR S A COM - L6388F110 - MINOR = 3161							
SOLD		05/25/2011	3018.60				
ACQ	29.0000	10/19/2009	3018.60	2225.75	SUB TRUST 033000788331	LT15 Y	
370.0000 MILLICOM INT'L CELLULAR S A COM - L6388F110 - MINOR = 3161							
SOLD		05/25/2011	38513 11				
ACQ	370.0000	02/03/2005	38513 11	7910.60	SUB TRUST 033000788331	LT15 Y	
159.0000 ASML HLDGS N V NY REG SHS ADR - N07059186 - MINOR = 3161							
SOLD		08/25/2011	5378.86				
ACQ	159.0000	08/11/2011	5378.86	5504.58	SUB TRUST 033000694190	ST Y	
685.0000 ASML HLDGS N V NY REG SHS ADR - N07059186 - MINOR = 3161							
SOLD		12/09/2011	28676 15				
ACQ	685.0000	08/11/2011	28676.15	23714.70	SUB TRUST 033000694190	ST Y	
39.0000 SENSATA TECH HLDG NV COM - N7902X106 - MINOR = 3162							
SOLD		07/19/2011	1465.52				
ACQ	39.0000	06/07/2011	1465.52	1404.78	SUB TRUST 033001874957	ST Y	
104.0000 SENSATA TECH HLDG NV COM - N7902X106 - MINOR = 3162							
SOLD		07/19/2011	3908.05				
ACQ	104.0000	11/16/2010	3908.05	2659.15	SUB TRUST 033001874957	ST Y	
347.0000 VISTAPRINT NV COM - N93540107 - MINOR = 3162							
SOLD		02/07/2011	18426 70				
ACQ	347.0000	08/16/2010	18426.70	10057.20	SUB TRUST 033001874957	ST Y	
36.0000 YANDEX NV COM - N97284108 - MINOR = 3162							
SOLD		08/25/2011	1123 90				
ACQ	36.0000	06/02/2011	1123.90	1187.79	SUB TRUST 033001960228	ST Y	
62.0000 YANDEX NV COM - N97284108 - MINOR = 3162							
SOLD		08/25/2011	1935 60				
ACQ	62.0000	05/27/2011	1935.60	2135.00	SUB TRUST 033001960228	ST Y	
184.0000 YANDEX NV COM - N97284108 - MINOR = 3162							
SOLD		08/25/2011	5744.37				
ACQ	184.0000	05/27/2011	5744.37	6336.13	SUB TRUST 033001960228	ST-W Y	
184.0000 YANDEX NV COM - N97284108 - MINOR = 3162							
SOLD		09/30/2011	3787.62				
ACQ	184.0000	06/01/2011	3787.62	6148.16	SUB TRUST 033001874957	ST Y	
99.0000 ROYAL CARIBBEAN CRUISES LTD - V7780T103 - MINOR = 3161							
SOLD		02/07/2011	4593 05				
ACQ	99.0000	06/18/2010	4593.05	2948.23	SUB TRUST 033001874957	ST Y	
93.0000 ROYAL CARIBBEAN CRUISES LTD - V7780T103 - MINOR = 3161							
SOLD		08/05/2011	2515 63				
ACQ	93.0000	05/09/2011	2515.63	3720.00	SUB TRUST 033001874957	ST Y	
235.0000 ROYAL CARIBBEAN CRUISES LTD - V7780T103 - MINOR = 3161							
SOLD		08/05/2011	6356 70				
ACQ	235.0000	06/18/2010	6356.70	6998.32	SUB TRUST 033001874957	LT15 Y	
11.0000 ROYAL CARIBBEAN CRUISES LTD - V7780T103 - MINOR = 3161							
SOLD		08/05/2011	297.55				
ACQ	11.0000	09/15/2010	297.55	323.04	SUB TRUST 033001874957	ST Y	
263.0000 DRYSHIPS INC COM - Y2109Q101 - MINOR = 3161							
SOLD		01/14/2011	1414 99				
ACQ	263.0000	11/16/2010	1414.99	1378.83	SUB TRUST 033001874957	ST Y	
2173.0000 DRYSHIPS INC COM - Y2109Q101 - MINOR = 3161							
SOLD		02/07/2011	10842 63				
ACQ	2173.0000	11/16/2010	10842.63	11392.39	SUB TRUST 033001874957	ST Y	
TOTALS			46736467.03	45072096.58			

SUMMARY OF CAPITAL GAINS/LOSSES

FEDERAL	SHORT TERM	LONG TERM 28%	LONG TERM 15%	ST WASH SALE	LT WASH SALE	1250 GAIN
NONCOVERED FROM ABOVE	-763809.21	0.00	2657823.27	-130982.77	-98660.84	0.00*
COVERED FROM ABOVE	0.00	0.00	0.00	0.00	0.00	
COMMON TRUST FUND	0.00	0.00	0.00			0.00
CAPITAL GAIN DIVIDENDS	0.00	0.00	12647.29			286.70
	-763809.21	0.00	2670470.56	-130982.77	-98660.84	286.70
STATE						
NONCOVERED FROM ABOVE	-763809.21	0.00	2657823.27	-130982.77	-98660.84	0.00*
COVERED FROM ABOVE	0.00	0.00	0.00	0.00	0.00	
COMMON TRUST FUND	0.00	0.00	0.00			0.00
CAPITAL GAIN DIVIDENDS	0.00	0.00	12647.29			286.70
	-763809.21	0.00	2670470.56	-130982.77	-98660.84	286.70

* - 1250 GAIN DETAILED ON TRANS PAGES, NOT ABOVE