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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

2011

For calendar year 2011 or tax year beginning

, and ending

Name of foundation R.D. & JOAN DALE HUBBARD FOUNDATION		A Employer identification number 75-2266308
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 2498		B Telephone number 760-773-6644
City or town, state, and ZIP code RUIDOSO, NM 88345		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) ▶ \$ 31,689,193.	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					
4 Dividends and interest from securities		788,714.	788,647.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		375,853.			STATEMENT 2
b Gross sales price for all assets on line 6a 8,646,024.					
7 Capital gain net income (from Part IV, line 2)			374,108.		
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		<28,321.>	62,574.		STATEMENT 3
12 Total. Add lines 1 through 11		1,136,246.	1,225,329.		
13 Compensation of officers, directors, trustees, etc		52,500.	0.		52,500.
14 Other employee salaries and wages		74,717.	0.		74,717.
15 Pension plans and employee benefits		6,322.	0.		6,322.
16 Legal fees					
b Accounting fees STMT 4		8,345.	0.		8,345.
c Other professional fees STMT 5		365.	0.		365.
17 Interest		24,025.	24,025.		0.
18 Taxes STMT 6		22,114.	12,174.		4,940.
19 Depreciation and depletion		45,847.	0.		
20 Occupancy		9,354.	0.		9,354.
21 Travel, conferences, and meetings		668.	0.		668.
22 Printing and publications					
23 Other expenses STMT 7		282,395.	227,334.		54,319.
24 Total operating and administrative expenses. Add lines 13 through 23		526,652.	263,533.		211,530.
25 Contributions, gifts, grants paid		1,227,104.			1,227,104.
26 Total expenses and disbursements. Add lines 24 and 25		1,753,756.	263,533.		1,438,634.
27 Subtract line 26 from line 12		<617,510.>			
a Excess of revenue over expenses and disbursements			961,796.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

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	2.		
	2 Savings and temporary cash investments	792,102.	1,955,647.	1,955,647.
	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			
	b Investments - corporate stock STMT 12	19,769,863.	19,297,781.	21,968,701.
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶ 1,618,910.				
Less accumulated depreciation STMT 10 ▶ 79,427.	1,580,096.	1,539,483.	1,196,654.	
12 Investments - mortgage loans				
13 Investments - other STMT 13	6,633,579.	5,637,451.	4,524,494.	
14 Land, buildings, and equipment basis ▶ 102,759.				
Less accumulated depreciation STMT 11 ▶ 84,162.	23,831.	18,597.	18,597.	
15 Other assets (describe ▶ STATEMENT 14)	2,300,100.	2,025,100.	2,025,100.	
16 Total assets (to be completed by all filers)	31,099,573.	30,474,059.	31,689,193.	
Liabilities	17 Accounts payable and accrued expenses	66.	66.	
	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 ▶ OTHER LIABILITIES)	0.	119,294.	
23 Total liabilities (add lines 17 through 22)	66.	119,360.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> X and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	31,099,507.	30,354,699.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> 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	31,099,507.	30,354,699.		
31 Total liabilities and net assets/fund balances	31,099,573.	30,474,059.		

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	31,099,507.
2 Enter amount from Part I, line 27a	2	<617,510.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	30,481,997.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	127,298.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	30,354,699.

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 PUBLICLY TRADED SECURITIES		P		
b PASSTHROUGH FROM PARTNERSHIPS		P		
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 8,458,488.		8,270,171.	188,317.
b 185,791.			185,791.
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			188,317.
b			185,791.
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	374,108.
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	1,385,126.	33,804,605.	.040974
2009	1,632,380.	29,627,386.	.055097
2008	2,326,955.	35,858,932.	.064892
2007	2,235,534.	39,710,931.	.056295
2006	1,763,985.	36,381,316.	.048486

2 Total of line 1, column (d)	2	.265744
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	.053149
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	32,034,337.
5 Multiply line 4 by line 3	5	1,702,593.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	9,618.
7 Add lines 5 and 6	7	1,712,211.
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	1,438,634.

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)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	19,236.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	19,236.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	19,236.
6	Credits/Payments		
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	10,000.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	10,000.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	20,000.
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	334.
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	430.
11	Enter the amount of line 10 to be Credited to 2012 estimated tax 430. Refunded ▶	11	0.

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
1b 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
1c 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?	X	
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) TX, NM, CA		
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

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 ► EDWARD A. BURGER Telephone no ► 760-773-6644 Located at ► 72980 FRED WARING DRIVE, SUITE B, PALM DESERT, CA ZIP+4 ► 92260			
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

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

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

If "Yes" to 6b, file Form 8870.

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

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

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
R.D. HUBBARD P.O. BOX 2498 RUIDOSO, NM 88345	DIR/PRESIDENT 1.00	0.	0.	0.
JOAN DALE HUBBARD P.O. BOX 2498 RUIDOSO, NM 88345	DIR/VICE PRES 1.00	0.	0.	0.
EDWARD A. BURGER 72980 FRED WARING DRIVE, SUITE B PALM DESERT, CA 92260	DIR/SEC/TREAS 1.00	0.	0.	0.
ROBERT DONALDSON P.O. BOX 2498 RUIDOSO, NM 88345	EXECUTIVE DIRECTOR 40.00	52,500.	0.	5,074.

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
NONE				

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

0

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

Form 990-PF (2011)

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	23,559,881.
b	Average of monthly cash balances	1b	1,249,531.
c	Fair market value of all other assets	1c	7,712,758.
d	Total (add lines 1a, b, and c)	1d	32,522,170.
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	32,522,170.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	487,833.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	32,034,337.
6	Minimum investment return. Enter 5% of line 5	6	1,601,717.

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	1,601,717.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	19,236.
b	Income tax for 2011 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	19,236.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,582,481.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,582,481.
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	1,582,481.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,438,634.
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	0.
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	1,438,634.
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	1,438,634.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				1,582,481.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			271,161.	
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 ▶ \$ 1,438,634.				
a Applied to 2010, but not more than line 2a			271,161.	
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				1,167,473.
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				415,008.
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(1)(3) or ☐ 4942(1)(5)

- 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))

R.D. HUBBARD

- 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

ROBERT DONALDSON, P.O. BOX 2498, RUIDOSO, NM 88345

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

GENERAL LETTER OF REQUEST

- c Any submission deadlines**

NONE-NOTICE OF ACCEPTANCE/DENIAL RETURNED IN TWO MONTHS

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

EDUCATIONAL PURPOSES PRIMARILY IN THESE STATES - CALIFORNIA, TEXAS, KANSAS, NEW MEXICO

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				
ALZHEIMER'S ASSOCIATION-NEW MEXICO CHAPTER ROSWELL, NM	NONE	PUBLIC	GENERAL SUPPORT	2,000.
AMERICAN QUARTER HORSE FOUNDATION AMARILLO, TX	NONE	PUBLIC	GENERAL SUPPORT	65,000.
ANGEL MINISTRIES, INC. PORTALES, NM	NONE	PUBLIC	GENERAL SUPPORT	7,000.
ARIZONA STATE UNIVERSITY TEMPE, AZ	NONE	PUBLIC	SCHOLARSHIP	1,000.
ARTHRITIS FOUNDATION PALM DESERT, CA	NONE	PUBLIC	GENERAL SUPPORT	2,500.
Total	SEE CONTINUATION SHEET(S)			3a 1,227,104.
b Approved for future payment				
NONE				
Total			3b	0.

Part XVI-A

Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	788,714.	
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory	523000	1,745.	18	374,108.	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a	PASSTHROUGH FROM					
b	PARTNERSHIP INVESTMENTS	523000	<90,895.>	14	6,598.	
c	RENTAL INCOME			16	55,974.	
d	OTHER INCOME			01	2.	
e						
12	Subtotal. Add columns (b), (d), and (e)		<89,150.>		1,225,396.	0.
13	Total. Add line 12, columns (b), (d), and (e)				13	1,136,246.

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B

Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

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

- | | | | |
|---|--|-------|-----|
| 1 | • Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | Yes |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| | (1) Cash | 1a(1) | |
| | (2) Other assets | 1a(2) | |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | |
| | (4) Reimbursement arrangements | 1b(4) | |
| | (5) Loans or loan guarantees | 1b(5) | |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | |
| 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. | | |

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

- 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
N/A		

**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) is based on all information of which preparer has any knowledge.

▶

Signature of officer or trustee

 X
Date

TREASURER

May the IRS discuss this return with the preparer shown below (see instr)?

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

CURTIS MAXFIELD

Preparer's signature

Date

Check ☐ self-employed

PTIN

Firm's name ► WHITLEY PENN LLP

Firm's EIN ▶ 75-2393478

Firm's address ► 8343 DOUGLAS AVENUE, STE. 400
DALLAS, TX 75225

Phone no (214) 393-9300

Form **990-PF** (2011)

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
ASSISTANCE LEAGUE OF CARLSBAD CARLSBAD, NM	NONE	PUBLIC	GENERAL SUPPORT	3,000.
ASSISTANCE LEAGUE OF CHAVES COUNTY ROSWELL, NM	NONE	PUBLIC	GENERAL SUPPORT	3,000.
ASSURANCE HOME, INC. ROSWELL, NM	NONE	PUBLIC	GENERAL SUPPORT	2,500.
BICYCLE RUIDOSO RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	500.
BIG BROTHERS BIG SISTERS OF SOUTHEASTERN NEW MEXICO RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	5,000.
BIGHORN BEHIND A MIRACLE PALM DESERT, CA	NONE	PUBLIC	GENERAL SUPPORT	28,500.
BIGHORN GOLF CLUB CHARITIES PALM DESERT, CA	NONE	PUBLIC	GENERAL SUPPORT	14,400.
BOYS & GIRLS CLUB OF CARLSBAD CARLSBAD, NM	NONE	PUBLIC	GENERAL SUPPORT	2,000.
BOYS & GIRLS CLUB OF HOBBS HOBBS, NM	NONE	PUBLIC	GENERAL SUPPORT	10,000.
BYU IDAHO REXBURG, ID	NONE	PUBLIC	SCHOLARSHIP	3,000.
Total from continuation sheets				1,149,604.

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
CAPITAN WOMEN'S CLUB CAPITAN, NM	NONE	PUBLIC	GENERAL SUPPORT	1,700.
CARLSBAD COMMUNITY KITCHEN CARLSBAD, NM	NONE	PUBLIC	GENERAL SUPPORT	7,000.
CARLSBAD FAMILY FELLOWSHIP, KIDZ INC. CARLSBAD, NM	NONE	PUBLIC	GENERAL SUPPORT	3,600.
CARRIZOZO LITTLE LEAGUE BASEBALL CARRIZOZO, NM	NONE	PUBLIC	GENERAL SUPPORT	8,000.
CENTER OF PROTECTIVE ENVIRONMENT, INC. ALAMOGORDO, NM	NONE	PUBLIC	GENERAL SUPPORT	2,500.
CHAMBER MUSIC FESTIVAL RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	2,000.
CITY OF RUIDOSO DOWNS POLICE DEPARTMENT RUIDOSO DOWNS, NM	NONE	PUBLIC	GENERAL SUPPORT	20,000.
CLOVIS CHAMBER OF COMMERCE CLOVIS, NM	NONE	PUBLIC	GENERAL SUPPORT	2,000.
CLOVIS MEALS OF WHEELS CLOVIS, NM	NONE	PUBLIC	GENERAL SUPPORT	5,000.
CLOVIS SPECIAL OLYMPICS CLOVIS, NM	NONE	PUBLIC	GENERAL SUPPORT	5,000.
Total from continuation sheets				

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
COLLEGE OF THE DESERT FOUNDATION PALM DESERT, CA	NONE	PUBLIC	GENERAL SUPPORT	51,000.
COLLEGE OF THE DESERT PALM DESERT, CA	NONE	PUBLIC	SCHOLARSHIP	2,463.
COLORADO STATE UNIVERSITY FORT COLLINS, CO	NONE	PUBLIC	SCHOLARSHIP	3,000.
COMMUNITY YOUTH CENTER WAREHOUSE RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	5,000.
DONA ANA COMMUNITY COLLEGE LAS CRUCES, NM	NONE	PUBLIC	SCHOLARSHIP	2,500.
EARLY YEARS CHILDHOOD CENTER RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	4,000.
EASTERN NEW MEXICO UNIVERSITY PORTALES, NM	NONE	PUBLIC	SCHOLARSHIP	7,961.
EISENHOWER MEDICAL CENTER RANCHO MIRAGE, CA	NONE	PUBLIC	GENERAL SUPPORT	200,000.
ERIC DICKERSON FOUNDATION CALABASAS, CA	NONE	PUBLIC	GENERAL SUPPORT	2,500.
FOOD BANK OF EASTERN NEW MEXICO CLOVIS, NM	NONE	PUBLIC	GENERAL SUPPORT	7,000.
Total from continuation sheets				

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
FORT LEWIS COLLEGE DURANGO, CO	NONE	PUBLIC	SCHOLARSHIP	2,000.
FRIENDS OF AMERICAN LAKE VETERANS GOLF COURSE LAKEWOOD, WA	NONE	PUBLIC	GENERAL SUPPORT	25,000.
GIRL SCOUTS OF THE DESERT SOUTHWEST CARLSBAD, NM	NONE	PUBLIC	GENERAL SUPPORT	1,500.
HARVEST MINISTRIES OF ROSWELL ROSWELL, NM	NONE	PUBLIC	GENERAL SUPPORT	3,000.
HELPING HANDS MINISTRIES PORTALES, NM	NONE	PUBLIC	GENERAL SUPPORT	4,800.
HONDO FFA HONDO, NM	NONE	PUBLIC	GENERAL SUPPORT	1,500.
HONDO VALLEY PUBLIC SCHOOLS HONDO, NM	NONE	PUBLIC	GENERAL SUPPORT	5,000.
HUBBARD MUSEUM OF THE AMERICAN WEST RUIDOSO DOWNS, NM	NONE	PUBLIC	GENERAL SUPPORT	5,000.
HUMANE SOCIETY OF LINCOLN COUNTY RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	2,000.
INTERNATIONAL STUDENT VOLUNTEERS YORBA LINDA, CA	NONE	PUBLIC	GENERAL SUPPORT	1,000.
Total from continuation sheets				

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
JEWISH FAMILY SERVICE LOS ANGELES, CA	NONE	PUBLIC	GENERAL SUPPORT	5,000.
JIMMIE JOHNSON FOUNDATION CHARLOTTE, NC	NONE	PUBLIC	GENERAL SUPPORT	5,000.
JOHN BURTON FOUNDATION SAN FRANCISCO, CA	NONE	PUBLIC	GENERAL SUPPORT	5,000.
JUNIOR SERVICE LEAGUE OF HOBBS, INC. HOBBS, NM	NONE	PUBLIC	GENERAL SUPPORT	5,000.
LAQUINTA HIGH SCHOOL CULINARY ARTS PROGRAM LA QUINTA, CA	NONE	PUBLIC	GENERAL SUPPORT	1,000.
LEA COUNTY COWBOY HALL OF FAME HOBBS, NM	NONE	PUBLIC	GENERAL SUPPORT	2,000.
LEGACY CHRISTIAN ACADEMY ALAMOGORDO, NM	NONE	PUBLIC	GENERAL SUPPORT	3,500.
LEXINGTON CANCER FOUNDATION, INC. LEXINGTON, KY	NONE	PUBLIC	GENERAL SUPPORT	2,500.
LINCOLN COUNTY AS TEACHERS RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	4,000.
LINCOLN COUNTY FAIR RUIDOSO DOWNS, NM	NONE	PUBLIC	GENERAL SUPPORT	1,000.
Total from continuation sheets				

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
LINCOLN COUNTY FOOD BANK RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	7,500.
LOYOLA MARYMOUNT UNIVERSITY LOS ANGELES, CA	NONE	PUBLIC	SCHOLARSHIP	10,000.
MARYWOOD-PALM VALLEY SCHOOL RANCHO MIRAGE, CA	NONE	PUBLIC	SCHOLARSHIP	16,690.
MARYWOOD-PALM VALLEY SCHOOL RANCHO MIRAGE, CA	NONE	PUBLIC	GENERAL SUPPORT	25,000.
MAYHILL COMMUNITY CENTER BOARD MAYHILL, NM	NONE	PUBLIC	SCHOLARSHIP	3,000.
MCCALLUM THEATRE PALM DESERT, CA	NONE	PUBLIC	GENERAL SUPPORT	25,000.
MIDWESTERN STATE UNIVERSITY WICHITA FALLS, TX	NONE	PUBLIC	SCHOLARSHIP	2,000.
MILLS ELEMENTARY/HOBBS MUNICIPAL SCHOOL HOBBS, NM	NONE	PUBLIC	GENERAL SUPPORT	6,500.
MISSION CARLSBAD/FIRST UNITED METHODIST CARLSBAD, NM	NONE	PUBLIC	GENERAL SUPPORT	2,800.
MUELLER, INC. ALBUQUERQUE, NM	NONE	PUBLIC	GENERAL SUPPORT	25,933.
Total from continuation sheets				

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
NELSON COUNTY INDUSTRIES BUILDING FUND ELIZABETHTOWN, KY	NONE	PUBLIC	GENERAL SUPPORT	25,000.
NEW MEXICO BOWL ALBUQUERQUE, NM	NONE	PUBLIC	GENERAL SUPPORT	2,200.
NEW MEXICO BOYS AND GIRLS RANCH ALBUQUERQUE, NM	NONE	PUBLIC	GENERAL SUPPORT	1,000.
NEW MEXICO CANCER CENTER FOUNDATION ROSWELL, NM	NONE	PUBLIC	GENERAL SUPPORT	2,500.
NEW MEXICO CHRISTIAN CHILDREN'S HOME PORTALES, NM	NONE	PUBLIC	GENERAL SUPPORT	7,000.
NEW MEXICO STATE UNIVERSITY LAS CRUCES, NM	NONE	PUBLIC	SCHOLARSHIP	14,000.
NORTH DAKOTA STATE UNIVERSITY FARGO, ND	NONE	PUBLIC	GENERAL SUPPORT	1,000.
NORTHERN ARIZONA UNIVERSITY FLAGSTAFF, AZ	NONE	PUBLIC	SCHOLARSHIP	4,000.
ORAL ROBERTS UNIVERSITY TULSA, OK	NONE	PUBLIC	SCHOLARSHIP	2,000.
PALM DESERT HIGH SCHOOL GOLF SCHOLARSHIP PROGRAM PALM DESERT, CA	NONE	PUBLIC	SCHOLARSHIP	1,000.
Total from continuation sheets				

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
PALM SPRINGS ART MUSEUM PALM DESERT, CA	NONE	PUBLIC	GENERAL SUPPORT	29,000.
PERMANENTLY DISABLED JOCKEY FUND ELMHURST, IL	NONE	PUBLIC	GENERAL SUPPORT	1,500.
PORTALES RECREATION CENTER PORTALES, NM	NONE	PUBLIC	GENERAL SUPPORT	4,000.
RICE UNIVERSITY HOUSTON, TX	NONE	PUBLIC	SCHOLARSHIP	2,000.
ROCHESTER INSTITUTE OF TECHNOLOGY ROCHESTER, NY	NONE	PUBLIC	SCHOLARSHIP	3,333.
ROSWELL JAZZ AND ARTS FESTIVAL ROSWELL, NM	NONE	PUBLIC	GENERAL SUPPORT	2,800.
ROSWELL LITERARY COUNCIL, INC. ROSWELL, NM	NONE	PUBLIC	GENERAL SUPPORT	2,500.
RUIDOSO DOWNS RACETRACK CHAPLAINCY RUIDOSO DOWNS, NM	NONE	PUBLIC	GENERAL SUPPORT	62,000.
SACRAMENTO MOUNTAIN SENIOR SERVICES CLOUDCROFT, NM	NONE	PUBLIC	GENERAL SUPPORT	4,200.
SACRAMENTO MOUNTAIN VILLAGE CLOUDCROFT, NM	NONE	PUBLIC	GENERAL SUPPORT	1,500.
Total from continuation sheets				

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
SACRED HEART CHURCH RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	25,000.
SANTA'S HELPERS, INC. ALTO, NM	NONE	PUBLIC	GENERAL SUPPORT	2,000.
SAVING AMERICA'S MUSTANGS WELLS, NV	NONE	PUBLIC	GENERAL SUPPORT	10,000.
SCHOLARSHIP SERTOMA RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	20,000.
SEVEN BRIDGES GALLERY GREENWICH, CT	NONE	PUBLIC	GENERAL SUPPORT	50,000.
SHERI'S MEMORIAL FUND HOBBS, NM	NONE	PUBLIC	GENERAL SUPPORT	4,000.
SIERRA BLANCA CHRISTIAN ACADEMY RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	4,300.
SMITH CENTER PUBLIC SCHOOL SMITH CENTER, KS	NONE	PUBLIC	SCHOLARSHIP	20,000.
SMITH CENTER SCHOOLS SMITH CENTER, KS	NONE	PUBLIC	GENERAL SUPPORT	50,000.
SOUTHWESTERN ARTS ALLIANCE, INC. HONDO, NM	NONE	PUBLIC	GENERAL SUPPORT	2,500.
Total from continuation sheets				

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
SPENCER THEATER FOR THE PERFORMING ARTS ALTO, NM	NONE	PUBLIC	GENERAL SUPPORT	36,000.
ST. EDWARD CATHOLIC SCHOOL CARLSBAD, NM	NONE	PUBLIC	GENERAL SUPPORT	7,100.
STATE FAIR OF TEXAS DALLAS, TX	NONE	PUBLIC	GENERAL SUPPORT	2,500.
TEXAS TECH UNIVERSITY LUBBOCK, TX	NONE	PUBLIC	SCHOLARSHIP	3,583.
THE HARTLEY HOUSE CLOVIS, NM	NONE	PUBLIC	GENERAL SUPPORT	5,000.
THE LIVING DESERT PALM DESERT, CA	NONE	PUBLIC	GENERAL SUPPORT	10,000.
THOROUGHbred RETIREMENT FOUNDATION LEXINGTON, KY	NONE	PUBLIC	GENERAL SUPPORT	2,500.
TOBY KEITH FOUNDATION NORMAN, OK	NONE	PUBLIC	GENERAL SUPPORT	17,500.
TRANSYLVANIA UNIVERSITY LEXINGTON, KY	NONE	PUBLIC	SCHOLARSHIP	500.
TRINITY CHRISTIAN ACADEMY CARLSBAD, NM	NONE	PUBLIC	GENERAL SUPPORT	2,400.
Total from continuation sheets				

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
TULAROSA PUBLIC LIBRARY TULAROSA, NM	NONE	PUBLIC	GENERAL SUPPORT	4,000.
UNIVERSITY OF MISSOURI COLUMBIA, MO	NONE	PUBLIC	SCHOLARSHIP	500.
UNIVERSITY OF NEW MEXICO ALBUQUERQUE, NM	NONE	PUBLIC	SCHOLARSHIP	8,000.
UNIVERSITY OF NEW MEXICO ALBUQUERQUE, NM	NONE	PUBLIC	GENERAL SUPPORT	25,000.
UNIVERSITY OF NORTH CAROLINA ASHVILLE ASHVILLE, NC	NONE	PUBLIC	SCHOLARSHIP	2,000.
UNIVERSITY OF SAN DIEGO SAN DIEGO, CA	NONE	PUBLIC	GENERAL SUPPORT	15,000.
VILLAGE OF RUIDOSO POLICE DEPARTMENT RUIDOSO, NM	NONE	PUBLIC	GENERAL SUPPORT	5,691.
WESTERN ARTISTS OF AMERICA FOUNTAIN HILLS, AZ	NONE	PUBLIC	GENERAL SUPPORT	2,500.
WESTERN NEW MEXICO UNIVERSITY PORTALES, NM	NONE	PUBLIC	SCHOLARSHIP	3,750.
WESTERN STATE COLLEGE OF COLORADO GUNNISON, CO	NONE	PUBLIC	SCHOLARSHIP	1,500.
Total from continuation sheets				

3 Grants and Contributions Paid During the Year (Continuation)

123631 08-03-11

2011 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
	BUILDINGS											
13	BUILDING REMODEL	081597SL	39.00	16		9,049.			9,049.	3,111.		232.
20	AIR CONDITIONER	091200SL	7.00	16		2,851.			2,851.	2,851.		0.
27	BATHROOM REMODEL	081108SL	39.00	16		3,773.			3,773.	230.		97.
	* 990-PF PG 1 TOTAL					15,673.		0.	15,673.	6,192.	0.	329.
	BUILDINGS											
	MACHINERY & EQUIPMENT											
1	EQUIPMENT/FURNITURE	063091200DB	7.00	17		9,567.			9,567.	9,567.		0.
4	IBM TYPEWRITER	040595SL	7.00	16		395.			395.	395.		0.
6	FURNITURE - VARIOUS	041095SL	7.00	16		4,349.			4,349.	4,349.		0.
7	FURNISHINGS	050395SL	7.00	16		1,190.			1,190.	1,190.		0.
9	OFFICE AWNING	061995SL	7.00	16		1,314.			1,314.	1,314.		0.
12	PHONE SYSTEM	081597SL	7.00	16		1,487.			1,487.	1,487.		0.
14	OFFICE FURNITURE	081597SL	7.00	16		2,862.			2,862.	2,862.		0.
15	CARPET, BLINDS, AWNING	081597SL	7.00	16		1,410.			1,410.	1,410.		0.
18	LIGHT FIXTURES & FAN	051799SL	7.00	16		873.			873.	873.		0.
19	PANASONIC COPIER	071499SL	7.00	16		4,843.			4,843.	4,843.		0.
22	PHONE SYSTEM	091503SL	7.00	16		400.			400.	400.		0.
26	COPIER - ROYAL RC	011506SL	5.00	16		2,500.			2,500.	2,292.		208.

128102
05-01-11

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

2011 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
282008	TOYOTA	110508SL		5.00	16	38,794.			38,794.	29,646.		3,182.
290000	COMPUTER FOR OFFICE	101408SL		5.00	16	1,512.			1,512.	1,155.		124.
	* 990-PF PG 1 TOTAL											
	MACHINERY & EQUIPM					71,496.		0.	71,496.	61,783.	0.	3,514.
	TRANSPORTATION											
	EQUIPMENT											
402008	CHRYSLER 300 C	052609SL		5.00	16	15,590.			15,590.	10,953.		1,391.
	* 990-PF PG 1 TOTAL											
	TRANSPORTATION EQU					15,590.		0.	15,590.	10,953.	0.	1,391.
	OTHER											
410000	THERMAL WAREHOUSE	120109SL		39.00	16	125,725.			125,725.	33,579.		32,237.
	CALLE LANTANA											
520000	BUILDING	051910SL		39.00	16	326,654.			326,654.	5,235.		8,376.
530000	LAND	010110L				35,000.			35,000.			0.
	* 990-PF PG 1 TOTAL											
	OTHER					161,891.		0.	161,891.	38,814.	0.	40,613.
	* GRAND TOTAL											
	990-PF PG 1 DEPR					172,166.		0.	172,166.	117,742.	0.	45,847.

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
INTEREST AND DIVIDENDS	788,714.	0.	788,714.
TOTAL TO FM 990-PF, PART I, LN 4	788,714.	0.	788,714.

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 2

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES	PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
(F) GAIN OR LOSS			
8,458,488.	8,270,171.	0.	0.
			188,317.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PASSTHROUGH FROM PARTNERSHIPS	PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
(F) GAIN OR LOSS			
185,791.	0.	0.	0.
			185,791.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PASSTHROUGH FROM PARTNERSHIPS	PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
(F) GAIN OR LOSS			
1,745.	0.	0.	0.
			1,745.

NET GAIN OR LOSS FROM SALE OF ASSETS	375,853.
CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	375,853.

FORM 990-PF	OTHER INCOME	STATEMENT	3
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PASSTHROUGH FROM PARTNERSHIP INVESTMENTS	<84,297.>	6,598.	
RENTAL INCOME	55,974.	55,974.	
OTHER INCOME	2.	2.	
TOTAL TO FORM 990-PF, PART I, LINE 11	<28,321.>	62,574.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	8,345.	0.		8,345.
TO FORM 990-PF, PG 1, LN 16B	8,345.	0.		8,345.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OTHER FEES	365.	0.		365.
TO FORM 990-PF, PG 1, LN 16C	365.	0.		365.

FORM 990-PF

TAXES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	12,174.	12,174.		0.
FEDERAL EXCISE TAXES	5,000.	0.		0.
PROPERTY TAXES	4,940.	0.		4,940.
TO FORM 990-PF, PG 1, LN 18	22,114.	12,174.		4,940.

FORM 990-PF

OTHER EXPENSES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AUTO EXPENSE	5,074.	0.		5,074.
DUES AND SUBSCRIPTIONS	1,166.	0.		1,166.
INSURANCE	25,627.	0.		25,627.
INVESTMENT EXPENSE	150,730.	150,730.		0.
MEALS & ENTERTAINMENT	436.	0.		436.
MISCELLANEOUS	766.	0.		766.
OFFICE EXPENSE	14,037.	0.		14,037.
PASSTHROUGH FROM PARTNERSHIP INVESTMENTS	56,357.	55,615.		0.
POSTAGE	5,140.	0.		5,140.
REPAIRS AND MAINTENANCE	2,073.	0.		2,073.
WOOD VILLAGE TOWN CENTER	20,989.	20,989.		0.
TO FORM 990-PF, PG 1, LN 23	282,395.	227,334.		54,319.

FOOTNOTES

STATEMENT 8

THE ORGANIZATION INVESTS IN SOME PARTNERSHIPS THAT ENGAGE IN SECTION 988 TRANSACTIONS THAT MAY GIVE RISE TO REPORTABLE TRANSACTIONS UNDER REG. 1.6011-4. THE ORGANIZATION DID NOT RECEIVE THE NECESSARY INFORMATION TO FILE FORM 8886 FOR ALL PARTNERSHIPS THAT ENGAGED IN SECTION 988 TRANSACTIONS.

FORM 990-PF OTHER DECREASES IN NET ASSETS OR FUND BALANCES STATEMENT 9

DESCRIPTION	AMOUNT
UNREALIZED LOSS PASSTHROUGH FROM PARTNERSHIP INVESTMENTS	127,298.
TOTAL TO FORM 990-PF, PART III, LINE 5	127,298.

FORM 990-PF DEPRECIATION OF ASSETS HELD FOR INVESTMENT STATEMENT 10

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	FAIR MARKET VALUE
THERMAL WAREHOUSE	1,257,256.	65,816.	1,191,440.	800,000.
CALLE LANTANA BUILDING	326,654.	13,611.	313,043.	361,654.
LAND	35,000.	0.	35,000.	35,000.
TO 990-PF, PART II, LN 11	1,618,910.	79,427.	1,539,483.	1,196,654.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 11

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	FAIR MARKET VALUE
EQUIPMENT/FURNITURE	9,567.	9,567.	0.	0.
IBM TYPEWRITER	395.	395.	0.	0.
FURNITURE - VARIOUS	4,349.	4,349.	0.	0.
FURNISHINGS	1,190.	1,190.	0.	0.
OFFICE AWNING	1,314.	1,314.	0.	0.
PHONE SYSTEM	1,487.	1,487.	0.	0.
BUILDING REMODEL	9,049.	3,343.	5,706.	5,706.
OFFICE FURNITURE	2,862.	2,862.	0.	0.
CARPET, BLINDS, AWNING	1,410.	1,410.	0.	0.
LIGHT FIXTURES & FAN	873.	873.	0.	0.
PANASONIC COPIER	4,843.	4,843.	0.	0.
AIR CONDITIONER	2,851.	2,851.	0.	0.
PHONE SYSTEM	400.	400.	0.	0.
COPIER - ROYAL RC 2310	2,500.	2,500.	0.	0.
BATHROOM REMODEL	3,773.	327.	3,446.	3,446.
2008 TOYOTA	38,794.	32,828.	5,966.	5,966.
COMPUTER FOR OFFICE	1,512.	1,279.	233.	233.
2008 CRYSLER 300 C	15,590.	12,344.	3,246.	3,246.
TO 990-PF, PART II, LN 14	102,759.	84,162.	18,597.	18,597.

FORM 990-PF

CORPORATE STOCK

STATEMENT 12

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BEL AIR 908 31333	1,321,088.	1,433,756.
BEL AIR SELECT 908 31593	2,237,035.	2,764,057.
BEL AIR GIOVINE	1,500,000.	1,635,738.
BEL AIR DODGE COX	218,320.	169,378.
BEL AIR FIXED 31823	5,033,904.	5,216,165.
BEL AIR MATTHEW TIGER	1,082,756.	1,025,361.
VANGUARD	0.	0.
BEL AIR MLP 32975	389,123.	2,409,205.
BEL AIR LAZARD	1,773,606.	1,522,109.
BEL AIR TROOB	1,500,000.	1,637,539.
BEL AIR ARTIO 69144	1,142,419.	1,330,263.
BEL AIR TRADEWINDS	1,059,447.	984,665.
BEL AIR MATTHEWS ASIA	559,775.	412,984.
BEL AIR BLACKROCK	500,000.	453,153.
BEL AIR SHAFFER CULLEN	480,548.	530,517.
BEL AIR GOLD	499,760.	443,811.
TOTAL TO FORM 990-PF, PART II, LINE 10B	19,297,781.	21,968,701.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 13

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
AMI IV-Q, LTD	COST	0.	0.
AMI IV-Q CAYMAN	COST	83,016.	32,409.
HICKS, MUSE, TATE & FURST EQUITY FUND III, LP	COST	1,400,281.	546,655.
HICKS, MUSE, TATE & FURST EQUITY FUND IV, LP	COST	136,712.	53,371.
HMTF EQUITY FUND IV (1999), LP	COST	63,047.	24,613.
PANAM SPORTS FUND IV, LP	COST	0.	0.
BEL AIR ABSOLUTE RETURN FUND, LP	COST	1,745,093.	1,758,076.
OMEGA CAPITAL INVESTORS, LP	COST	1,203,663.	1,203,664.
TCW AMERICAS DEVELOPMENT ASSOCIATION, LP	COST	0.	0.
BEL AIR DYAL CAPITAL PARTNERS	COST	130,639.	150,000.
ARTWORK	COST	875,000.	755,706.
TOTAL TO FORM 990-PF, PART II, LINE 13		5,637,451.	4,524,494.

FORM 990-PF

OTHER ASSETS

STATEMENT 14

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DEPOSITS	100.	100.	100.
NOTE RECEIVABLE - WVO INVESTMENTS	1,800,000.	1,800,000.	1,800,000.
NOTE RECEIVABLE - JAY NEWCOM	500,000.	225,000.	225,000.
TO FORM 990-PF, PART II, LINE 15	2,300,100.	2,025,100.	2,025,100.

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

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

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

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

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

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

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

Type or print	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	R.D. & JOAN DALE HUBBARD FOUNDATION	<input checked="" type="checkbox"/> 75-2266308
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	P.O. BOX 2498	<input type="checkbox"/>
File by the due date for filing your return. See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	RUIDOSO, NM 88345	

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

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

EDWARD A. BURGER

- The books are in the care of ► 72980 FRED WARING DRIVE, SUITE B - PALM DESERT, CA 92260
Telephone No. ► 760-773-6644 FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2012, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year 2011 or
► ☐ tax year beginning _____, and ending _____.

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	20,000.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	10,000.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	10,000.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 1-2012)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

		Enter filer's identifying number, see instructions	
Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or	
	R.D. & JOAN DALE HUBBARD FOUNDATION	<input checked="" type="checkbox"/> 75-2266308	
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)	
	P.O. BOX 2498	<input type="checkbox"/>	
City, town or post office, state, and ZIP code. For a foreign address, see instructions.			
RUIDOSO, NM 88345			

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

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

EDWARD A. BURGER

- The books are in the care of **72980 FRED WARING DRIVE, SUITE B - PALM DESERT, CA 92260**

Telephone No. **760-773-6644**

FAX No. ☐

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2012.**

5 For calendar year **2011**, or other tax year beginning ☐, and ending ☐.

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return

☐ Change in accounting period

7 State in detail why you need the extension

ADDITIONAL TIME IS NEEDED TO GATHER THE INFORMATION NECESSARY TO PREPARE A COMPLETE AND ACCURATE RETURN.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	20,000.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	20,000.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature ☐

Title **CPA FOR TAXPAYER**

Date ☐

Form 8868 (Rev. 1-2012)