Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2011

For calendar year 2011 or tax year beginning 04-01 , 2011, and ending 03-31 , 20 12

Name of foundation: The Helene Wurlitzer Foundation of New Mexico

A Employer identification number: 85-0128634

Number and street (or P O box number if mail is not delivered to street address): PO Box 1891 | Room/suite:

B Telephone number (see instructions): (575) 758-2413

City or town, state, and ZIP code: Taos, NM 87571

C If exemption application is pending, check here ▶ [ ]

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return [ ] Amended return [ ] Address change [ ] Name change

D 1. Foreign organizations, check here ▶ [ ]
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]

H Check type of organization: [X] Section 501(c)(3) exempt private foundation [ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 4,001,431

J Accounting method [ ] Cash [X] Accrual [ ] Other (specify) (Part I, column (d) must be on cash basis)

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	11,525			
	2	Check ▶ [X] if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	62,566	62,566	62,566	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	16,858			
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)				
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	90,949	62,566	62,566	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	55,668		8,350	47,318
	14	Other employee salaries and wages	44,193		6,629	37,564
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest STM110				
	18	Taxes (attach schedule) (see instructions) STM126	8,619			
	19	Depreciation (attach schedule) and depletion	36,627			
	20	Occupancy	33,236		4,985	28,251
	21	Travel, conferences, and meetings	5,785		868	4,917
	22	Printing and publications				
	23	Other expenses (attach schedule) STM103	38,439		5,466	32,673
	24	**Total operating and administrative expenses.** Add lines 13 through 23	222,567	0	26,298	150,723
	25	Contributions, gifts, grants paid	2,350			0
	26	**Total expenses and disbursements.** Add lines 24 and 25	224,917	0	26,298	150,723
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	(133,968)			
	b	**Net investment income** (if negative, enter -0-)		62,566		
	c	**Adjusted net income** (if negative, enter -0-)			36,268	

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Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	51,033	81,432	81,432
	2 Savings and temporary cash investments	141,439	40,632	40,632
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule) STM137	1,156,481	1,003,167	1,003,167
	c Investments - corporate bonds (attach schedule)			
	11 Investments - land, buildings and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ 1,135,384			
	Less accumulated depreciation (attach sch STM119 ▶ 785,323	384,709	350,061	1,575,500
	15 Other assets (describe ▶ STM120)	145,143	145,143	1,300,700
	16 **Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	1,878,805	1,620,435	4,001,431
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ STM121)	4,296	6,446	
	23 **Total liabilities** (add lines 17 through 22)	4,296	6,446	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here** ▶ [X] **and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted	1,874,509	1,613,989	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [ ] **and complete lines 27 through 31.**			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances** (see instructions)	1,874,509	1,613,989	
	31 **Total liabilities and net assets/fund balances** (see instructions)	1,878,805	1,620,435	

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	1,874,509
2 Enter amount from Part I, line 27a	2	(133,968)
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	1,740,541
5 Decreases not included in line 2 (itemize) ▶ STM116	5	126,552
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,613,989

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 (yr , mo , day)	(d) Date sold (yr , mo , day)
1a				
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				
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
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	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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 the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010			
2009			
2008			
2007			
2006			

2 **Total** of line 1, column (d)	2	
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	
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	0
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	0
8 Enter qualifying distributions from Part XII, line 4	8	

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

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 ▶ [X] and enter "N/A" on line 1 Date of ruling or determination letter 1972-07-17 (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [ ] and enter 1% of Part I, line 27b	1	N/A
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	0
6	Credits/Payments		
a	2011 estimated tax payments and 2010 overpayment credited to 2011 — 6a		
b	Exempt foreign organizations - tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	
8	Enter any **penalty** for underpayment of estimated tax Check here [ ] if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2012 estimated tax** ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		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?	6	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	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NM			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	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	9	X	
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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?	13	X	

Website address ▶ wurlitzerfoundation .org

14 The books are in care of ▶ Michael Knight Telephone no ▶ 575-758-2413

Located at ▶ PO Box 1891 Taos, NM ZIP+4 ▶ 87571

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041-Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

			Yes	No
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
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		X
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? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2011 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011)	3b		
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)? (see instructions) ☐ Yes ☒ No
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)? **5b** No: X
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No
If "Yes," attach the statement required by Regulations section 53 4945-5(d)
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X
If "Yes" to 6b, file Form 8870
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See 990_OFOV				
Michael Knight PO Box 1891 Taos, NM 87571	Executive Direc 40	55,668	0	0
Joseph Caldwell PO Box 1891 Taos, NM 87571	Director 0	0	0	0
William Ebie PO Box 1891 Taos, NM 87571	Treasurer 1	0	0	0
Harold Hahn PO Box 1891 Taos, NM 87571	Secretary 1	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1 - see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
Total number of others receiving over $50,000 for professional services ▶		

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 The foundation maintains 11 residency units for which 42 artists received grants during the fiscal year.	67,600
2 The foundation maintains a permanent collection of art, which is open for public viewing.	2,643
3	
4	

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	0
2	
All other program-related investments See instructions 3	
Total. Add lines 1 through 3 ▶	

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	1,079,824
b	Average of monthly cash balances	1b	56,686
c	Fair market value of all other assets (see instructions)	1c	2,876,200
d	**Total** (add lines 1a, b, and c)	1d	4,012,710
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	4,012,710
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	60,191
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,952,519
6	**Minimum investment return.** Enter 5% of line 5	6	197,626

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

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

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	150,723
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4.	4	150,723
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	150,723

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					
2	Undistributed income, if any, as of the end of 2011					
a	Enter amount for 2010 only					
b	Total for prior years ____ , ____ , ____					
3	Excess distributions carryover, if any, to 2011					
a	From 2006					
b	From 2007					
c	From 2008					
d	From 2009					
e	From 2010					
f	**Total** of lines 3a through e					
4	Qualifying distributions for 2011 from Part XII, line 4 ▶ $ 150,723					
a	Applied to 2010, but not more than line 2a					
b	Applied to undistributed income of prior years (Election required - see instructions)					
c	Treated as distributions out of corpus (Election required - see instructions)					
d	Applied to 2011 distributable amount					
e	Remaining amount distributed out of corpus		150,723			
5	Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)					
6	**Enter the net total of each column as indicated below:**					
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5		150,723			
b	Prior years' undistributed income Subtract line 4b from line 2b					
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed					
d	Subtract line 6c from line 6b Taxable amount - see instructions					
e	Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instructions					
f	Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012					
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)					
8	Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)					
9	**Excess distributions carryover to 2012** Subtract lines 7 and 8 from line 6a		150,723			
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	150,723				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling . . . . ▶ 1972-07-17

b Check box to indicate whether the foundation is a private operating foundation described in section [X] 4942(j)(3) or [ ] 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	62,566	63,991	48,960	56,463	231,980
b 85% of line 2a	53,181	54,392	41,616	47,994	197,183
c Qualifying distributions from Part XII, line 4 for each year listed	150,723	153,595	190,489	181,006	675,813
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 . . .	150,723	153,595	190,489	181,006	675,813
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	131,751		136,493	146,246	414,490
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

990APP

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

c Any submission deadlines

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

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				
Joshua Tafoya PO Box 1052 Ranchos De Taos NM 87557	artist		Artistic devel	1,000
Kaylor Karlin 3213 Loma Vista Pl Albuquerque NM 87106	artist		Artistic devel	1,000
Shared Table PO Box 895 Ranchos De Taos NM 87557	none		Annual support	100
Taos Volunteer Fire Dept PO Box 4591 Taos NM 87571	none		Annual support	200
Taos Kiwanis Club PO Box 303 Taos NM 87571	none		Annual support	50
Vrious artists List on file in office Taos NM 87571	artists		Artist grants of occupancy and studio space	67,600
Total . . . . . . ▶ 3a				69,950
b Approved for future payment				
Total . . . . . . ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
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	62,566	
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			18	4,158	
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a Cleaning fees			03	1,750	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				68,474	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 68,474

(See worksheet in line 13 instructions to verify calculations)

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

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

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Sign Here

Signature of officer or trustee | Date 2-15-13 | Title Executive Director

May the IRS discuss this return with the preparer shown below (see inst)? ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Andrew C Respess		2/15/2013		P00386593

Firm's name	Respess and Respess PC	Firm's EIN	
Firm's address	PO Box 1378 El Prado NM 87529	Phone no	575-776-9858

The Helene Wurlitzer Foundation of New Mexico 85-0128634

Form 990PF, Part III, Line 5
Other Decreases Schedule

Statement #116

Unrealized losses	126,552
Total	126,552

PG 01
Statement #120

Form 990PF, Part II, Line 15
Other Assets Schedule

Description	BOY Book	EOY Book	FMV
Artwork and collections	144,443	144,443	1,300,000
Utility deposits	700	700	700
Total	145,143	145,143	1,300,700

PG 01
Statement #121

Form 990PF, Part II, Line 22
Other Liabilities Schedule

Description	BOY Amount	EOY Amount
Damage deposits	4,296	6,446
Total	4,296	6,446

PG 01
Statement #137

Form 990PF, Part II, Line 10(b)
Investments: Corporate Stock Schedule

Category	BOY	Book Value	EOY FMV
US Stocks	1,156,481	1,003,167	1,003,167
Totals	1,156,481	1,003,167	1,003,167

Federal Supporting Statements

Name(s) as shown on return: The Helene Wurlitzer Foundation of New Mexico

Your Social Security Number: 85-0128634

Form 990PF, Part I, Line 23 - Other Expenses Schedule

Statement #103

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Auto expense	3,932	0	590	3,343
Contract services	9,318	0	1,398	7,920
Insurance	16,151	0	2,423	13,728
Library	2,645	0	397	2,248
Miscellaneous	86	0	13	73
Office	1,572	0	236	1,336
Telephone	3,897	0	284	3,312
Postage	402	0	60	342
Dues and subscriptions	436	0	65	371
Totals	38,439	0	5,466	32,673

Form 990PF, Part I, Line 18 - Taxes Schedule

Statement #110

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Payroll taxes	8,619	0	0	0
Totals	8,619	0	0	0

Federal Supporting Statements

2011 PG01

Name(s) as shown on return: The Helene Wurlitzer Foundation of New Mexico

Your Social Security Number: 85-0128634

Form 990PF, Part II, Line 14 - Land Etc. Schedule

Statement #119

Description	Cost or other basis	Accumulated depreciation	End of year book value	FMV
Furniture, fixtures and equipment	115,881	113,861	2,020	15,000
Vehicles	32,365	32,365		2,500
Buildings	186,460	186,460		200,000
Building improvements	740,582	451,910	288,672	600,000
Land	52,096		52,096	750,000
Land improvements	8,000	727	7,273	8,000
Total	1,135,384	785,323	350,061	1,575,500

PG 01

Form 990PF, Part I, Line 19 - Depreciation Schedule

Statement #126

Description	Date Acquired	Cost or Other basis	Prior year Depreciation	Computation Method	Rate	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
See schedule	01-01-2011	1,135,384			32		36,627		
Totals		1,135,384					36,627		

Federal Supporting Statements	2011 PG 01
Name(s) as shown on return	Your Social Security Number
The Helene Wurlitzer Foundation of New Mexico	85-0128634

Form 990PF, Part XV, Line 2 990APP

Application Submission Information

Grant Program
Artist in residence

Applicant Name
Michael Knight

Address
PO Box 1891 Taos NM 87571

Telephone
575-758-2413

Form & Content
Completion of standard application indicating artistic area, date of requested grant, description of proposed project at the foundation, and submission of sample work.

Submission Deadline
January 18

Restrictions on Award
Limited on time period of residency.

STM LD

ASSET DEPRECIATION SHORT REPORT
THE HELENE WURLITZER FOUNDATION ***Mar. 31, 2012***

Sorted ASSET A/C#
Method 1-FEDERAL-Std Conv Applied

Range 1200 - 1250
Include All assets

						Includes Section 179		
Date Acq	**Description**	Meth/Life	**Cost**	Section 179	**Depr Basis**	**Beg A/Depr**	**Curr Depr**	**End A/Depr**
ASSET A/C#· 1200 - FURN, FIXTURES AND EQUIP								
01/01/90	Prior assets	SL/ 5 00	50,574 24	0 00	50,574 24	50,574 24	0 00	50,574 24
05/17/95	Alarm system	SL/10 00	313 50	0 00	313 50	313 50	0 00	313 50
08/04/95	Refrigerator	SL/10 00	524.99	0 00	524 99	524 99	0 00	524 99
12/28/95	Copier	SL/10 00	5,595 00	0 00	5,595 00	5,595 00	0 00	5,595 00
02/20/96	Washer and dryer	SL/10 00	1,195 93	0 00	1,195 93	1,195 93	0 00	1,195 93
02/22/96	Microwave	SL/10 00	988 68	0 00	988 68	988 68	0 00	988 68
02/23/96	4 Gas ranges	SL/10 00	1,368 00	0 00	1,368 00	1,368 00	0 00	1,368 00
03/01/96	Snowblower	SL/10 00	449 99	0 00	449 99	449 99	0 00	449 99
03/31/96	Office equipment	SL/10 00	6,810 73	0 00	6,810 73	6,810 73	0 00	6,810 73
04/11/96	Beds	SL/ 5 00	911 51	0 00	911 51	911 51	0 00	911 51
04/13/96	Chairs	SL/ 5 00	1,303 00	0 00	1,303 00	1,303 00	0 00	1,303 00
04/29/96	Cushions	SL/ 5 00	349 29	0 00	349 29	349 29	0 00	349 29
02/06/97	Refrigerator	SL/10 00	939 99	0 00	939 99	939 99	0 00	939 99
04/14/97	Refrigerator	SL/ 7 00	549 00	0 00	549 00	549 00	0 00	549 00
05/09/97	Mower	SL/ 5 00	900 51	0 00	900 51	900 51	0 00	900 51
05/29/97	Library steps	SL/ 7 00	303 95	0 00	303 95	303 95	0 00	303 95
06/05/97	Mulcher	SL/ 5 00	379 00	0 00	379 00	379 00	0 00	379 00
06/20/97	Tractor	SL/ 5 00	3,029 95	0 00	3,029 95	3,029 95	0 00	3,029 95
06/25/97	Table saw	SL/ 5 00	874 99	0 00	874 99	874 99	0 00	874 99
06/25/97	Tools and chest	SL/ 5 00	1,099 97	0 00	1,099 97	1,099 97	0 00	1,099 97
07/29/97	Riccar 8725 vacuum	SL/ 5 00	325 00	0 00	325 00	325 00	0 00	325 00
07/30/97	Keyboard	SL/ 5 00	349 99	0 00	349 99	349 99	0 00	349 99
08/01/97	Refrigerator	SL/ 7 00	499 00	0 00	499 00	499 00	0 00	499 00
08/08/97	Range	SL/ 7 00	409 00	0 00	409 00	409 00	0 00	409 00
08/11/97	Chain saw	SL/ 5 00	419 95	0 00	419 95	419 95	0 00	419 95
10/01/97	Northern Hydraulics	SL/ 5 00	8,233 29	0 00	8,233 29	8,233 29	0 00	8,233 29
10/19/97	2 Way radio	SL/ 5 00	514 86	0 00	514 86	514 86	0 00	514 86
11/03/97	File cabinets	SL/ 7 00	547 92	0 00	547 92	547 92	0 00	547 92
12/20/97	Washing machine	SL/ 7 00	409 00	0 00	409 00	409 00	0 00	409 00
01/28/98	Vertical blinds	SL/ 7 00	966 00	0 00	966 00	966 00	0 00	966 00
02/03/98	Nail gun	SL/ 5 00	531 84	0 00	531 84	531 84	0 00	531 84
04/14/98	Billy Goat	SL/ 5 00	2,169 00	0 00	2,169 00	2,169 00	0 00	2,169 00
05/19/98	Sand blaster	SL/ 5 00	454 19	0 00	454 19	454 19	0 00	454 19
08/19/98	Desk and credenza	SL/ 7 00	5,500 00	0 00	5,500 00	5,500 00	0 00	5,500 00
09/30/98	Range	SL/ 5 00	409.00	0 00	409 00	409 00	0 00	409 00
01/29/99	Printer and copier	SL/ 5 00	1,454 98	0 00	1,454 98	1,454 98	0 00	1,454 98
03/25/99	Range	SL/ 5 00	409 00	0 00	409 00	409 00	0 00	409 00
03/25/99	Refrigerator	SL/ 5 00	479 00	0 00	479 00	479 00	0 00	479 00
06/04/99	Computer	SL/ 5 00	1,491 94	0 00	1,491 94	1,491 94	0 00	1,491 94
12/26/02	Computer	SL/ 5 00	797 37	0 00	797 37	797 37	0 00	797 37
06/07/04	Piano (Commons house)	SL/ 7 00	3,000 00	0 00	3,000 00	2,785 71	214 29	3,000 00
09/06/05	Refirgerator for #5	SL/ 7 00	474 98	0 00	474 98	373 18	67 85	441 03
03/13/06	New ranges for 9S & 7	SL/ 7 00	853 55	0 00	853 55	670 67	121 94	792 61
07/19/06	Regulator for #8	MSL/ 7 00	173 07	0 00	173 07	111 24	24 72	135 96
10/16/06	Appliances for commons house	MSL/ 7 00	3,465 98	0 00	3,465 98	2,228 13	495 14	2,723 27
03/09/09	Recording equip library	MSL/ 5 00	844 47	0 00	844 47	422 23	168 89	591 12
03/11/09	IMAC (library)	MSL/ 5 00	1,415 00	0 00	1,415 00	707 50	283 00	990 50
08/06/10	Bookcase	MSL/ 7 00	395 00	0 00	395 00	28 21	56 43	84 64
11/30/10	Cell phone (Verizon)	MSL/ 5 00	426 82	0 00	426 82	42 68	85 36	128 04
05/11/11 A	Blinds for Casita #10	MSL/ 7 00	1,980 00	0 00	1,980 00	0 00	141 43	141 43
Grand totals	1200 - FURN, FIXTURES AND EQUIP (50 assets)		117,861 42	0 00	117,861 42	112,202 10	1,659 05	113,861 15
ASSET A/C#: 1210 - VEHICLES								
01/01/85	1983 Dodge Pickup	SL/ 5 00	7,160 30	0 00	7,160 30	7,160 30	0 00	7,160 30
12/30/95	1987 Toyota Pickup	SL/ 5 00	10,345 50	0 00	10,345 50	10,345 50	0 00	10,345 50
01/01/96	1995 Nuway utility trailer	SL/ 5 00	500 00	0 00	500 00	500 00	0 00	500 00
08/04/97	Utility trailer	SL/ 5 00	559 27	0 00	559 27	559 27	0 00	559 27
11/17/99	1997 Pontiac	SL/ 5 00	13,800 00	0 00	13,800 00	13,800 00	0 00	13,800 00

ASSET DEPRECIATION SHORT REPORT

THE HELENE WURLITZER FOUNDATION ***Mar. 31, 2012***

Sorted· ASSET A/C#
Method· 1-FEDERAL-Std Conv Applied

Range 1200 - 1250
Include All assets

Date Acq	Description	Meth/Life	Cost	Section 179	Depr Basis	Beg A/Depr (Includes Section 179)	Curr Depr (Includes Section 179)	End A/Depr (Includes Section 179)
Grand totals· 1210 - VEHICLES (5 assets)			32,365 07	0 00	32,365 07	32,365 07	0 00	32,365 07
ASSET A/C#: 1220 - 1220 BUILDINGS								
04/01/98	Buildings	SL/20 00	186,460 12	0 00	186,460 12	186,460 12	0 00	186,460 12
Grand totals 1220 - 1220 BUILDINGS (1 assets)			186,460 12	0 00	186,460 12	186,460 12	0 00	186,460 12
ASSET A/C#: 1230 - BUILDING IMPROVEMENTS								
01/01/90	Prior assets	SL/20 00	52,254 92	0 00	52,254 92	52,254 92	0 00	52,254 92
01/01/96	1996 Improvements	SL/20 00	8,980 14	0 00	8,980 14	6,847 40	449 01	7,296 41
09/30/96	1997 Improvements	SL/20 00	51,959 07	0 00	51,959 07	37,670 28	2,597 95	40,268 23
09/30/97	1998 Improvements	SL/20 00	82,926 23	0 00	82,926 23	56,320 74	4,146 31	60,467 05
09/30/98	1999 Improvements	SL/20 00	111,789 77	0 00	111,789 77	69,868 62	5,589 49	75,458 11
09/30/99	2000 Improvements	SL/20 00	82,716 42	0 00	82,716 42	47,567 60	4,135 82	51,703 42
09/30/00	2001 Improvements	SL/20 00	125,821 13	0 00	125,821 13	66,056 13	6,291 06	72,347 19
09/30/01	2002 Improvements	SL/20 00	85,102 63	0 00	85,102 63	40,429 56	4,255 13	44,684 69
09/30/02	2003 Improvements	SL/20 00	37,091 92	0 00	37,091 92	15,764 10	1,854 60	17,618 70
04/30/03	New fence	SL/10 00	2,045 85	0 00	2,045 85	1,687 83	143 21	1,831 04
04/01/04	2005 Improvements	SL/20 00	14,535 54	0 00	14,535 54	5,087 46	726 78	5,814 24
10/01/05	2006 Improvements	SL/20 00	30,900 69	0 00	30,900 69	8,497 67	1,545 03	10,042 70
10/01/06	FYE 033107 Improvements	MSL/20 00	10,059 63	0 00	10,059 63	2,263 41	502 98	2,766 39
04/04/07	Commons house lights/smoke detector	MSL/20 00	1,018 31	0 00	1,018 31	178 22	50 92	229 14
09/06/07	Commons house laundry and coat room	MSL/20 00	1,148 95	0 00	1,148 95	201 07	57 45	258 52
03/31/08	Roof repairs/new construction	MSL/20 00	21,084 40	0 00	21,084 40	3,689 77	1,054 22	4,743 99
05/28/08	Commons house concrete work	MSL/20 00	4,000 00	0 00	4,000 00	500 00	200 00	700 00
06/07/08	Tile work (bathrooms, etc)	MSL/20 00	4,348 82	0 00	4,348 82	543 60	217 44	761 04
09/30/08	Blinds	MSL/ 7 00	4,360 60	0 00	4,360 60	1,557 35	622 94	2,180 29
10/01/09	Various improvements	MSL/20 00	0 00	0 00	0 00	0 00	0 00	0 00
09/30/10	Casita 6 upgrade	MSL/20 00	5,046 59	0 00	5,046 59	126 16	252 33	378 49
09/30/10	Casita 9n improvements	MSL/20 00	650 00	0 00	650 00	16 25	32 50	48 75
09/30/10	Casita 10s cabinets	MSL/20 00	760 00	0 00	760 00	19 00	38 00	57 00
Grand totals 1230 - BUILDING IMPROVEMENTS (23 assets)			738,601 61	0 00	738,601 61	417,147 14	34,763 17	451,910 31
ASSET A/C#: 1240 - 1240 LAND								
01/01/50	Land	LAND/ 7 00	10,346 15	0 00	10,346 15	0 00	0 00	0 00
04/01/98	1998 Land additions	LAND/ 7 00	41,749 55	0 00	41,749 55	0 00	0 00	0 00
Grand totals 1240 - 1240 LAND (2 assets)			52,095 70	0 00	52,095 70	0 00	0 00	0 00
ASSET A/C#: 1250 - LAND IMPROVEMENTS								
09/30/08	Parking lot improvements	MSL/39 00	8,000 00	0 00	8,000 00	521 37	205 13	726 50
Grand totals 1250 - LAND IMPROVEMENTS (1 assets)			8,000 00	0 00	8,000 00	521 37	205 13	726 50
Grand totals for all accounts: (82 assets)			1,135,383 92	0 00	1,135,383 92	748,695 80	36,627 35	785,323 15

Codes that may appear next to the date acquired include· A - Addition, D - Disposal, T - Traded, MQ - Mid Quarter Applied

Additional Summary Statistics·	Cost	Curr Yr 179	Prior Yr 179	Depr Basis	Beg A/Depr	Curr Depr	Ending A/Depr	Net Book Val
Grand Totals for All Assets	1,135,383 92	0 00	0 00	1,135,383 92	748,695 80	36,627.35	785,323 15	350,060 77
Less· Inactive Assets	0 00	0 00	0 00	0 00	0 00	0 00	0 00	0 00
Disposed Assets	0 00	0 00	0 00	0 00	0 00	0 00	0 00	0 00
Traded Assets	0 00	0 00	0 00	0 00	0 00	0 00	0 00	0 00
Net Totals (Active Assets)	1,135,383 92	0 00	0 00	1,135,383 92	748,695 80	36,627 35	785,323 15	350,060 77

Total Additional First Year Depreciation Taken at 30% Rate: ***0.00***

Total Additional First Year Depreciation Taken at 50% Rate· ***0 00***

Total Additional First Year Depreciation Taken· ***0.00***

Current Officers, Directors, Trustees, and Key Employees

1 List all officers, directors, trustees, and key employees for the year even if they were not compensated.

(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 deferred compensation	(e) Expense account, other allowances
Tito Naranjo PO Box 1891 Taos, NM 87571	Director 0	0	0	0
Rena Rosequist PO Box 1891 Taos, NM 87571	President 1	0	0	0
Peggy Nelson PO Box 1891 Taos, NM 87571	Vice President 0	0	0	0

Form **8868**
(Rev January 2012)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

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

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box . . . . ▶ ☒
- 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

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 The Helene Wurlitzer Foundation of New Mex	Employer identification number (EIN) or ☒ 85-0128634
	Number, street, and room or suite no If a P O box, see instructions PO Box 1891	Social security number (SSN) ☐
	City, town or post office, state, and ZIP code For a foreign address, see instructions Taos, NM 87571	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

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

- The books are in the care of ▶ MICHAEL A KNIGHT PO BOX 1891 Taos, NM 87571

Telephone No ▶ 575-758-2413 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 11-15 , 20 12, to file the exempt organization return for the organization named above The extension is for the organization's return for

▶ ☐ calendar year 20 ___ or

▶ ☒ tax year beginning 04-01 , 20 11, and ending 03-31 , 20 12

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	$ 0
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	$ 0
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	$ 0

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