



See a Social Security Number? Say Something!  
Report Privacy Problems to <https://public.resource.org/privacy>  
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

OMB No 1545-0052

**2011**

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

For calendar year 2011 or tax year beginning **JUL 1, 2011**, and ending **JUN 30, 2012**

Name of foundation <b>THE ROBERT &amp; MARIE HANSEN FOUNDATION</b>		A Employer identification number <b>86-6309859</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>12475 N. RANCHO VISTOSO BLVD</b>		B Telephone number <b>(520)219-5407</b>
Room/suite <b>155</b>		C If exemption application is pending, check here <input type="checkbox"/>
City or town, state, and ZIP code <b>ORO VALLEY, AZ 85737</b>		D 1 Foreign organizations, 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 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) \$ <b>9,439,741.</b>	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		67,959.	67,959.		STATEMENT 1
4 Dividends and interest from securities		540.	540.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10					
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)					
11 Other income		125,141.	125,141.		STATEMENT 3
12 Total Add lines 1 through 11		193,640.	193,640.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages		52,500.	10,500.		42,000.
15 Pension plans, employee benefits		2,229.	446.		1,783.
16a Legal fees					
b Accounting fees STMT 4		12,995.	6,498.		6,497.
c Other professional fees STMT 5		17,627.	16,313.		1,314.
17 Interest					
18 Taxes STMT 6		7,155.	797.		3,186.
19 Depreciation and depletion		1,001.	0.		
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		2,317.	468.		1,824.
24 Total operating and administrative expenses. Add lines 13 through 23		95,824.	35,022.		56,604.
25 Contributions, gifts, grants paid		364,100.			364,100.
26 Total expenses and disbursements Add lines 24 and 25		459,924.	35,022.		420,704.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<266,284.>			
b Net investment income (if negative, enter -0-)			158,618.		
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	Savings and temporary cash investments	4,824,421.	1,949,364.	1,949,364.
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	250,000.	502,944.	502,944.
7	Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges	4,799.	1,627.	1,627.
10a	Investments - U.S. and state government obligations			
b	Investments - corporate stock			
c	Investments - corporate bonds			
11	Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
12	Investments - mortgage loans STMT 9	3,821,979.	3,780,819.	4,663,646.
13	Investments - other STMT 10	0.	2,302,994.	2,322,160.
14	Land, buildings, and equipment: basis ▶ 27,028.			
	Less accumulated depreciation STMT 11 ▶ 27,028.	1,001.	0.	0.
15	Other assets (describe ▶ STATEMENT 12)	2,021.	0.	0.
16	<b>Total assets</b> (to be completed by all filers)	8,904,221.	8,537,748.	9,439,741.

Liabilities

17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable			
22	Other liabilities (describe ▶ STATEMENT 13)	100,189.	0.	
23	<b>Total liabilities</b> (add lines 17 through 22)	100,189.	0.	

Net Assets or Fund Balances

	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>			
	<b>and complete lines 24 through 26 and lines 30 and 31.</b>			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>			
	<b>and complete lines 27 through 31</b>			
27	Capital stock, trust principal, or current funds	0.	0.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
29	Retained earnings, accumulated income, endowment, or other funds	8,804,032.	8,537,748.	
30	<b>Total net assets or fund balances</b>	8,804,032.	8,537,748.	
31	<b>Total liabilities and net assets/fund balances</b>	8,904,221.	8,537,748.	

**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	8,804,032.
2	Enter amount from Part I, line 27a	2	<266,284.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	8,537,748.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	8,537,748.

**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.)
<b>1a</b>				
<b>b</b>	NONE			
<b>c</b>				
<b>d</b>				
<b>e</b>				

  

(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)
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

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))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

<b>2</b> 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	<b>2</b>	
<b>3</b> 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		<b>3</b>	

**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	460,924.	9,185,391.	.050180
2009	407,227.	9,520,757.	.042773
2008	548,966.	9,629,126.	.057011
2007	462,798.	9,958,089.	.046475
2006	403,520.	8,191,991.	.049258
<b>2</b> Total of line 1, column (d)			<b>2</b> .245697
<b>3</b> 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			<b>3</b> .049139
<b>4</b> Enter the net value of noncharitable-use assets for 2011 from Part X, line 5			<b>4</b> 9,241,143.
<b>5</b> Multiply line 4 by line 3			<b>5</b> 454,101.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b> 1,586.
<b>7</b> Add lines 5 and 6			<b>7</b> 455,687.
<b>8</b> Enter qualifying distributions from Part XII, line 4			<b>8</b> 420,704.

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)	1	3,172.
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	2	0.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).	3	3,172.
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
3	Add lines 1 and 2	5	3,172.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	6a	4,799.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	6b	
6	Credits/Payments:	6c	
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6d	
b	Exempt foreign organizations - tax withheld at source	7	4,799.
c	Tax paid with application for extension of time to file (Form 8868)	8	
d	Backup withholding erroneously withheld	9	
7	Total credits and payments. Add lines 6a through 6d	10	1,627.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	11	0.
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>		
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>		
11	Enter the amount of line 10 to be: <b>Credited to 2012 estimated tax</b> <b>1,627.</b> <b>Refunded</b>		

**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
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <b>\$ 0.</b> (2) On foundation managers. <b>\$ 0.</b>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <b>\$ 0.</b>		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <b>AZ</b>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

**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 ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>PAUL CLIFTON</u> Telephone no. ► <u>(520) 219-5407</u> Located at ► <u>12475 N. RANCHO VISTOSO BLVD. STE 155, ORO VALLEY</u> ZIP+4 ► <u>85755</u>			
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 checked="" type="checkbox"/> Yes <input 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 type="checkbox"/> Yes <input checked="" 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 <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
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.)	N/A	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

Form 990-PF (2011)

**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**

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

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

If "Yes" to 6b, file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

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

5b

6b

7b

X

**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
PAUL T. CLIFTON 12475 N. RANCHO VISTOSO BLVD. STE 155 ORO VALLEY, AZ 85755	TRUSTEE 5.00	0.	0.	0.
MARIE E. HANSEN 12475 N. RANCHO VISTOSO BLVD. STE 155 ORO VALLEY, AZ 85755	TRUSTEE 5.00	0.	0.	0.
SUSAN LEA CLIFTON 12475 N. RANCHO VISTOSO BLVD. STE 155 ORO VALLEY, AZ 85755	TRUSTEE 10.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
TIARA ZARCONE - 12475 N. RANCHO VISTOSO BLVD. STE 155, ORO VALLEY,	VICE PRESIDENT 40.00	52,500.	2,229.	350.

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

0





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

<b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b> Average monthly fair market value of securities	<b>1a</b>	3,560,136.
<b>b</b> Average of monthly cash balances	<b>1b</b>	129,619.
<b>c</b> Fair market value of all other assets	<b>1c</b>	5,692,116.
<b>d</b> Total (add lines 1a, b, and c)	<b>1d</b>	9,381,871.
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b> Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b> Subtract line 2 from line 1d	<b>3</b>	9,381,871.
<b>4</b> Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	140,728.
<b>5</b> Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	9,241,143.
<b>6</b> Minimum investment return. Enter 5% of line 5	<b>6</b>	462,057.

**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.)

<b>1</b> Minimum investment return from Part X, line 6	<b>1</b>	462,057.
<b>2a</b> Tax on investment income for 2011 from Part VI, line 5	<b>2a</b>	3,172.
<b>b</b> Income tax for 2011. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b> Add lines 2a and 2b	<b>2c</b>	3,172.
<b>3</b> Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	458,885.
<b>4</b> Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b> Add lines 3 and 4	<b>5</b>	458,885.
<b>6</b> Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b> Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	458,885.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b> Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	420,704.
<b>b</b> Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b> Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b> Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b> Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	420,704.
<b>5</b> Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	0.
<b>6</b> Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	420,704.

**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
<b>1</b> Distributable amount for 2011 from Part XI, line 7				<b>458,885.</b>
<b>2</b> Undistributed income, if any, as of the end of 2011				
<b>a</b> Enter amount for 2010 only			<b>0.</b>	
<b>b</b> Total for prior years:		<b>0.</b>		
<b>3</b> Excess distributions carryover, if any, to 2011:				
<b>a</b> From 2006	<b>2,634.</b>			
<b>b</b> From 2007				
<b>c</b> From 2008	<b>70,642.</b>			
<b>d</b> From 2009				
<b>e</b> From 2010	<b>6,284.</b>			
<b>f</b> Total of lines 3a through e	<b>79,560.</b>			
<b>4</b> Qualifying distributions for 2011 from Part XII, line 4: ▶ \$ <b>420,704.</b>				
<b>a</b> Applied to 2010, but not more than line 2a			<b>0.</b>	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		<b>0.</b>		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	<b>0.</b>			
<b>d</b> Applied to 2011 distributable amount				<b>420,704.</b>
<b>e</b> Remaining amount distributed out of corpus	<b>0.</b>			
<b>5</b> Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	<b>38,181.</b>			<b>38,181.</b>
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	<b>41,379.</b>			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		<b>0.</b>		
<b>c</b> 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		<b>0.</b>		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		<b>0.</b>		
<b>e</b> Undistributed income for 2010. Subtract line 4a from line 2a. Taxable amount - see instr.			<b>0.</b>	
<b>f</b> Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012				<b>0.</b>
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	<b>0.</b>			
<b>8</b> Excess distributions carryover from 2006 not applied on line 5 or line 7	<b>0.</b>			
<b>9</b> Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	<b>41,379.</b>			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2007				
<b>b</b> Excess from 2008	<b>35,095.</b>			
<b>c</b> Excess from 2009				
<b>d</b> Excess from 2010	<b>6,284.</b>			
<b>e</b> Excess from 2011				



**Part XV** Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH 500 E. CORONADO ROAD PHOENIX, AZ 85004	NONE	501(C)(3) ORG (PUBLIC CHARITY)	GENERAL OPERATIONS	73,000.
DIVINE SAVIOR HOLY ANGELS HIGH SCHOOL 4257 NORTH 100TH STREET MILWAUKEE, WI 53222	NONE	501(C)(3) ORG (PUBLIC CHARITY)	WELLNESS PROGRAM	16,100.
INSTITUTE FOR JUSTICE 901 N. GLEBE RD., STE 900 ARLINGTON, VA 22203	NONE	501(C)(3) ORG (PUBLIC CHARITY)	GENERAL OPERATIONS	25,000.
THE ACTON INSTITUTE FOR THE STUDY OF RELIGION AND LIBERTY 161 OTTAWA AVE., NW, STE. 301 GRAND RAPIDS, MI 49503	NONE	501(C)(3) ORG (PUBLIC CHARITY)	GENERAL OPERATIONS	25,000.
THE FREEDOM & PROSPERITY ACADEMY 2455 E. SPEEDWAY BLVD., SUITE 204 TUCSON, AZ 85719	NONE	501(C)(3) ORG (PUBLIC CHARITY)	GENERAL OPERATIONS	225,000.
<b>Total</b>			<b>▶ 3a</b>	<b>364,100.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			<b>▶ 3b</b>	<b>0.</b>



## Part XVII

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

- |          |  | Yes          |
|----------|--|--------------|
| <b>1</b> | 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?  |              |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of:   |              |
|          | (1) Cash   | <b>1a(1)</b> |
|          | (2) Other assets   | <b>1a(2)</b> |
| <b>b</b> | Other transactions:  |              |
|          | (1) Sales of assets to a noncharitable exempt organization   | <b>1b(1)</b> |
|          | (2) Purchases of assets from a noncharitable exempt organization   | <b>1b(2)</b> |
|          | (3) Rental of facilities, equipment, or other assets   | <b>1b(3)</b> |
|          | (4) Reimbursement arrangements   | <b>1b(4)</b> |
|          | (5) Loans or loan guarantees   | <b>1b(5)</b> |
|          | (6) Performance of services or membership or fundraising solicitations   | <b>1b(6)</b> |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | <b>1c</b>    |
| <b>d</b> | 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.

and belief, it is true, correct, and complete Declaration of

► Paul T. Weyman

Signature of officer or trustee

Date \_\_\_\_\_

TRUSTEE

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

☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name  
**JAY L. BUCK,**  
**CPA/ABV, CVA**

Preparer's signature  
J L B  
JAY L. BUCK, CPA/

Date	05/08/13
------	----------

Check ☐ if  
self-employed

PTIN

P00105868

Firm's name ► CLIFTONLARSONALLEN LLP

Firm's EIN ► 41-0746749

Firm's address ► 335 N WILMOT ROAD, SUITE 300  
TUCSON, AZ 85711

Phone no. (520) 790-3500

2011 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Convention	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	MICROEDGE (SOFTWARE)	09/17/08	200DB	3.00		H1L7	27,028.			13,514.	13,514.	12,513.		1,001.	13,514.
	* TOTAL 990-PF PG 1 DEPR						27,028.			13,514.	13,514.	12,513.		1,001.	13,514.

---



---

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

---

SOURCE	AMOUNT
NORTHERN TRUST BANK INTEREST CHECKING (-4165)	2.
NORTHERN TRUST BANK INTEREST CHECKING (-8453)	117.
TMC-DM & ENDLESS SUMMER NOTES INTEREST INCOME	67,840.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	67,959.

---



---



---



---

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

---

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
MISSION MANAGEMENT AND TRUST CO. DIVIDENDS	540.	0.	540.
TOTAL TO FM 990-PF, PART I, LN 4	540.	0.	540.

---



---



---



---

FORM 990-PF OTHER INCOME STATEMENT 3

---

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
US DEBT FUND EAGLES NEST I LLLP	105,974.	105,974.	
STANFIELD FARMS - OPTION FEE INCOME	19,167.	19,167.	
TOTAL TO FORM 990-PF, PART I, LINE 11	125,141.	125,141.	

---



---



---



---

FORM 990-PF ACCOUNTING FEES STATEMENT 4

---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	12,995.	6,498.		6,497.
TO FORM 990-PF, PG 1, LN 16B	12,995.	6,498.		6,497.

---



---



---



---

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
-------------	-------------------------	-----------	---

---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	15,823.	15,823.		0.
CONTRACT LABOR	431.	215.		216.
OTHER PROFESSIONAL EXPENSES	1,373.	275.		1,098.
TO FORM 990-PF, PG 1, LN 16C	17,627.	16,313.		1,314.

---



---

FORM 990-PF	TAXES	STATEMENT	6
-------------	-------	-----------	---

---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	3,172.	0.		0.
PAYROLL TAXES	3,983.	797.		3,186.
TO FORM 990-PF, PG 1, LN 18	7,155.	797.		3,186.

---



---

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
-------------	----------------	-----------	---

---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE AND ADMINISTRATIVE EXPENSES	303.	152.		151.
BANK CHARGES	200.	100.		100.
TELEPHONE	1,439.	216.		1,223.
EMPLOYEE TRAINING AND EDUCATION	350.	0.		350.
NON-DEDUCTIBLE INVESTMENT EXPENSES	25.	0.		0.
TO FORM 990-PF, PG 1, LN 23	2,317.	468.		1,824.

## FOOTNOTES

STATEMENT 8

## INFORMATION CONCERNING AMOUNT DUE FROM DISQUALIFIED PERSON

DUE TO AN INADVERTENT ERROR, \$252,944 WAS TRANSFERRED TO SEVEN CHARITABLE REMAINDER UNITRUSTS ON JUNE 29, 2012. CORRECTIVE ACTION WAS TAKEN AND THE FUNDS WERE RETURNED IN SEPT. 2012.

## INFORMATION CONCERNING AMOUNT DUE FROM DISQUALIFIED PERSON

DUE TO AN INADVERTENT ERROR, \$250,000 WAS LOANED TO THE HANSFAM THREE SETTLEMENT TRUST IN JULY 2010. CORRECTIVE ACTION WAS TAKEN IN OCT. 2012 AND THE FUNDS WERE REPAYED ALONG WITH ACCRUED INTEREST AT THE APPLICABLE FEDERAL RATE.

TOTAL OF TWO AMOUNTS ABOVE:

502,944.

---



---

FORM 990-PF	MORTGAGE LOANS	STATEMENT	9
-------------	----------------	-----------	---

---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MORTGAGE LOAN INVESTMENT	3,780,819.	4,663,646.
TOTAL TO FORM 990-PF, PART II, LINE 12	3,780,819.	4,663,646.

---



---

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
-------------	-------------------	-----------	----

---

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
STANFIELD FARMS	COST	2,302,994.	2,322,160.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,302,994.	2,322,160.

---



---

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

---

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
MICROEDGE (SOFTWARE)	27,028.	27,028.	0.
TOTAL TO FM 990-PF, PART II, LN 14	27,028.	27,028.	0.

---



---

FORM 990-PF	OTHER ASSETS	STATEMENT	12
-------------	--------------	-----------	----

---

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DUE FROM TX FOUNDATION	2,021.	0.	0.
TO FORM 990-PF, PART II, LINE 15	2,021.	0.	0.

---

FORM 990-PF	OTHER LIABILITIES	STATEMENT	13
-------------	-------------------	-----------	----

---

DESCRIPTION	BOY AMOUNT	EOY AMOUNT
US DEBT OPPORTUNITY FUND - UNREALIZED INCOME	100,189.	0.
TOTAL TO FORM 990-PF, PART II, LINE 22	100,189.	0.

---

---

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	14
-------------	--	-----------	----

---

---

NAME OF MANAGER

---

PAUL T. CLIFTON  
MARIE E. HANSEN  
SUSAN LEA CLIFTON

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 15

---

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

---

PAUL CLIFTON  
12475 N. RANCHO VISTOSO BLVD., SUITE 155  
ORO VALLEY, AZ 85755

---

TELEPHONE NUMBER

---

520-219-5407

---

FORM AND CONTENT OF APPLICATIONS

---

NO PRESCRIBED FORM IS REQUIRED BUT SUBMISSIONS MUST INCLUDE EVIDENCE OF TAX  
EXEMPT STATUS OF THE ORGANIZATION, INCLUDING A COPY OF THE ORGANIZATION'S  
EXEMPT STATUS LETTER FROM IRS.

---

ANY SUBMISSION DEADLINES

---

N/A

---

RESTRICTIONS AND LIMITATIONS ON AWARDS

---

N/A

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

**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).

Type or print	Enter filer's identifying number, see instructions	
Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or	
THE ROBERT & MARIE HANSEN FOUNDATION	<input checked="" type="checkbox"/>	86-6309859
Number, street, and room or suite no. If a P.O. box, see instructions	Social security number (SSN)	
12475 N. RANCHO VISTOSO BLVD, NO. 155	<input type="checkbox"/>	
City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
ORO VALLEY, AZ 85737		

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-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.**

PAUL CLIFTON - 12475 N. RANCHO VISTOSO BLVD. STE 155 -

- The books are in the care of ☒ ORO VALLEY, AZ 85755

Telephone No ☒ (520) 219-5407

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 MAY 15, 2013

5 For calendar year 2011, or other tax year beginning JUL 1, 2011, and ending JUN 30, 2012

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  
**ALL PERTINENT INFORMATION NECESSARY FOR PROPER COMPLETION OF RETURN IS NOT YET AVAILABLE.**

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	\$	1,432.
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	\$	4,799.
c	<b>Balance due.</b> 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

Date ☐

Form 8868 (Rev. 1-2012)