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 10/01 , 2011, and ending 9/30 , 2012

THE JAMES R. MOFFETT FAMILY FOUNDATION
1615 POYDRAS STREET, 22ND FLOOR
NEW ORLEANS, LA 70112-1254

A Employer Identification number 72-1345770

B Telephone number (see the instructions) 504-309-9344

C If exemption application is pending, check here ☐

D 1 Foreign organizations, check here ☐

2 Foreign organizations meeting the 85% test, check here and attach computation ☐

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

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

G Check all that apply. ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

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

I Fair market value of all assets at end of year (from Part II, column (c), line 16) ► $ 421,569.

J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE	1 Contributions, gifts, grants, etc, received (att sch)	39,000.			
	2 Ck ► ☐ if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	4,636.	4,636.		
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10	890.			
	b Gross sales price for all assets on line 6a 251,190.				
	7 Capital gain net income (from Part IV, line 2)		890.		
	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/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	44,526.	5,526.	0.	
OPERATING AND ADMINISTRATIVE EXPENSES	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch) SEE ST 1	1,410.			
	c Other prof fees (attach sch)				
	17 Interest				
	18 Taxes (attach schedule)(see instrs) SEE STM 2	5.			
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) SEE STATEMENT 3	1,049.			
	24 **Total operating and administrative expenses.** Add lines 13 through 23	2,464.			
	25 Contributions, gifts, grants paid PART XV	366,000.			330,000.
	26 **Total expenses and disbursements.** Add lines 24 and 25	368,464.	0.	0.	330,000.
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	-323,938.			
	b **Net investment income** (if negative, enter -0-)		5,526.		
	c **Adjusted net income** (if negative, enter -0-)			0.	

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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			
2 Savings and temporary cash investments	745,507.	421,569.	421,569.
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 sch) ►			
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)			
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 ►			
Less. accumulated depreciation (attach schedule) ►			
15 Other assets (describe ►)			
16 **Total assets** (to be completed by all filers — see the instructions Also, see page 1, item I)	745,507.	421,569.	421,569.
LIABILITIES			
17 Accounts payable and accrued expenses			
18 Grants payable			
19 Deferred revenue			
20 Loans from officers, directors, trustees, & other disqualified persons			
21 Mortgages and other notes payable (attach schedule)			
22 Other liabilities (describe ►)			
23 **Total liabilities** (add lines 17 through 22)	0.	0.	
NET ASSETS OR FUND BALANCES			
Foundations that follow SFAS 117, check here ► [ ] and complete lines 24 through 26 and lines 30 and 31.			
24 Unrestricted			
25 Temporarily restricted			
26 Permanently restricted			
Foundations that do not follow SFAS 117, check here ► [X] and complete lines 27 through 31.			
27 Capital stock, trust principal, or current funds	745,507.	421,569.	
28 Paid-in or capital surplus, or land, building, and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds			
30 **Total net assets or fund balances** (see instructions)	745,507.	421,569.	
31 **Total liabilities and net assets/fund balances** (see instructions)	745,507.	421,569.	

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	745,507.
2 Enter amount from Part I, line 27a	2	-323,938.
3 Other increases not included in line 2 (itemize) ►	3	
4 Add lines 1, 2, and 3	4	421,569.
5 Decreases not included in line 2 (itemize) ►	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	421,569.

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 shares MLC Company)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a	250,000 US TREASURY NOTE	P	8/28/09	4/05/12
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	251,190.		250,300.	890.
b				
c				
d				
e				

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

	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a				890.
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** 890.

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** 0.

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 [X] 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 (column (b) divided by column (c))
2010	251,885.	830,573.	0.303267
2009	270,343.	1,103,145.	0.245066
2008	197,852.	1,351,243.	0.146422
2007	185,700.	1,549,185.	0.119869
2006	119,713.	1,574,720.	0.076022

2	**Total** of line 1, column (d)	2	0.890646
3	Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.178129
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	547,596.
5	Multiply line 4 by line 3	5	97,543.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	55.
7	Add lines 5 and 6	7	97,598.
8	Enter qualifying distributions from Part XII, line 4	8	330,000.

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)

1 a Exempt operating foundations described in section 4940(d)(2), check here ► [ ] and enter 'N/A' on line 1. Date of ruling or determination letter: ________ (attach copy of letter if necessary – see instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► [X] and enter 1% of Part I, line 27b		1	55.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	55.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 **Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-		5	55.
6 Credits/Payments:			
a 2011 estimated tax pmts and 2010 overpayment credited to 2011	6a 433.		
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	433.
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	0.
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ►		10	378.
11 Enter the amount of line 10 to be: Credited to 2012 estimated tax ► 378.	**Refunded** ►	11	0.

Part VII-A — Statements Regarding Activities

		Yes	No
1 a 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 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 ► $ 0. **(2)** On foundation managers ► $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If 'Yes,' attach a detailed description of the activities.*	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	N/A	
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, column (c), and Part XV*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► LA			
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 ► N/A

14 The books are in care of ► HENRY DAUTERIVE Telephone no ► 504-309-9344

Located at ► 1615 POYDRAS STREET, SUITE 2279 NEW ORLEANS ZIP + 4 ► 70112-1254

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** – Check here N/A ► ☐

and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

			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

			Yes	No
	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			
1 a	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	N/A	
	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 ► 20__ , 20__ , 20__ , 20__ .			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer 'No' and attach statement – see instructions)	2b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ► 20__ , 20__ , 20__ , 20__			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If 'Yes,' did it have excess business holdings in 2011 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011)*	3b	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? [ ] Yes [X] 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 [X] No

(3) Provide a grant to an individual for travel, study, or other similar purposes? [ ] Yes [X] 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) STMT 7 [X] 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 [X] 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? STMT 8 [X] 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 [X] 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 [X] No

b If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? N/A **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation (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 STATEMENT 4		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 ► 0

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

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

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

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (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	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ►	0.

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	
b Average of monthly cash balances		1b	555,935.
c Fair market value of all other assets (see instructions)		1c	
d **Total** (add lines 1a, b, and c)		1d	555,935.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2 Acquisition indebtedness applicable to line 1 assets		2	0.
3 Subtract line 2 from line 1d		3	555,935.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)		4	8,339.
5 **Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	547,596.
6 **Minimum investment return.** Enter 5% of line 5		6	27,380.

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

1 Minimum investment return from Part X, line 6		1	27,380.
2a Tax on investment income for 2011 from Part VI, line 5	2a 55.		
b Income tax for 2011. (This does not include the tax from Part VI)	2b		
c Add lines 2a and 2b		2c	55.
3 Distributable amount before adjustments Subtract line 2c from line 1		3	27,325.
4 Recoveries of amounts treated as qualifying distributions		4	
5 Add lines 3 and 4		5	27,325.
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	27,325.

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	330,000.
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	330,000.
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	55.
6 **Adjusted qualifying distributions.** Subtract line 5 from line 4	6	329,945.

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				27,325.
2 Undistributed income, if any, as of the end of 2011:				
a Enter amount for 2010 only			0.	
b Total for prior years. 20___, 20___, 20___		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006 — 61,637.				
b From 2007 — 109,034.				
c From 2008 — 130,586.				
d From 2009 — 215,500.				
e From 2010 — 210,586.				
f **Total** of lines 3a through e	727,343.			
4 Qualifying distributions for 2011 from Part XII, line 4: ► $ 330,000.				
a Applied to 2010, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2011 distributable amount				27,325.
e Remaining amount distributed out of corpus	302,675.			
5 Excess distributions carryover applied to 2011 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,030,018.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount — see instructions		0.		
e Undistributed income for 2010. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)	61,637.			
9 **Excess distributions carryover to 2012.** Subtract lines 7 and 8 from line 6a	968,381.			
10 Analysis of line 9.				
a Excess from 2007 — 109,034.				
b Excess from 2008 — 130,586.				
c Excess from 2009 — 215,500.				
d Excess from 2010 — 210,586.				
e Excess from 2011 — 302,675.				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling ►

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

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

Part XV | Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year — see 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.

SEE STATEMENT 5

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

SEE STATEMENT FOR LINE 2A

c Any submission deadlines:

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT 6				
Total			► 3a	366,000.
b Approved for future payment				
Total			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	4,636.	
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	890.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				5,526.	

13 Total. Add line 12, columns (b), (d), and (e) 13 5,526.

(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)
N/A	

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
N/A			

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

b If 'Yes,' complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

Signature of officer or trustee: [signature] Date: 5/14/13 Title: CONTROLLER

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
LISA Englade	Lisa M Englade CPA	5/11/13		P00623104

Firm's name ► Wegmann Dazet & Company, APC — Firm's EIN ► 72-0870824

Firm's address ► 111 Veterans Blvd. Ste 800, Metairie, LA 70005 — Phone no (504) 837-8844

BAA

TEEA0503L 07/15/11

Schedule B
(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► **Attach to Form 990, Form 990-EZ, or Form 990-PF**

OMB No 1545-0047

2011

Name of the organization	Employer identification number
THE JAMES R. MOFFETT FAMILY FOUNDATION	72-1345770

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)(_____) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor (Complete Parts I and II.)

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc, purposes, but these contributions did not total to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc, purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc, contributions of $5,000 or more during the year ► $__________

Caution: An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF) but it **must** answer 'No' on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2, of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization: THE JAMES R. MOFFETT FAMILY FOUNDATION

Employer identification number: 72-1345770

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MOFFETT HOLDINGS ,LLC 1615 POYDRAS STREET NEW ORLEANS, LA 70112	$ 39,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)

Name of organization
THE JAMES R. MOFFETT FAMILY FOUNDATION

Employer identification number
72-1345770

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A	$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization: THE JAMES R. MOFFETT FAMILY FOUNDATION

Employer identification number: 72-1345770

Part III ***Exclusively*** **religious, charitable, etc, individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year.** Complete cols (a) through (e) and the following line entry

For organizations completing Part III, enter total of *exclusively* religious, charitable, etc, contributions of **$1,000 or less** for the year (Enter this information once. See instructions.) ► $ N/A

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

STATEMENT 1
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	$ 1,410.			
TOTAL	$ 1,410.	$ 0.	$ 0.	$ 0.

STATEMENT 2
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	$ 5.			
TOTAL	$ 5.	$ 0.	$ 0.	$ 0.

STATEMENT 3
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK CHARGES	$ 354.			
OFFICE SUPPLIES EXPENSES	695.			
TOTAL	$ 1,049.	$ 0.	$ 0.	$ 0.

STATEMENT 4
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN-SATION	CONTRI-BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
JAMES R. MOFFETT 1615 POYDRAS ST., 23RD FLOOR NEW ORLEANS, LA 70112-1254	PRESIDENT 0	$ 0.	$ 0.	$ 0.
LOUISE H. MOFFETT 1615 POYDRAS ST., SUITE 2279 NEW ORLEANS, LA 70112-1254	VICE PRESIDENT 1.00	0.	0.	0.

STATEMENT 4 (CONTINUED)
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN-SATION	CONTRI-BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
CRYSTAL L. MOFFETT-LOURD 1615 POYDRAS ST. SUITE 2279 NEW ORLEANS, LA 70112-1254	SECRETARY 1.00	$ 0.	$ 0.	$ 0.
JAMES R. MOFFETT, JR. 1615 POYDRAS ST., SUITE 2279 NEW ORLEANS, LA 70112-1254	TREASURER 1.00	0.	0.	0.
CYNTHIA M. MOLYNEUX 1615 POYDRAS ST SUITE 2279 NEW ORLEANS, LA 70112-1254	EXECUTIVE DIR. 4.00	0.	0.	0.
	TOTAL	$ 0.	$ 0.	$ 0.

STATEMENT 5
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:	
NAME:	CYNTHIA M. MOLYNEUX
CARE OF:	THE JAMES R. MOFFETT FOUNDATION
STREET ADDRESS:	1615 POYDRAS STREET, SUITE 2279
CITY, STATE, ZIP CODE:	NEW ORLEANS, LA 70112-1254
TELEPHONE:	
FORM AND CONTENT:	FORMAL WRITTEN REQUEST OUTLINING SPECIFIC NEEDS AND USE OF FUNDS
SUBMISSION DEADLINES:	N/A
RESTRICTIONS ON AWARDS:	N/A

STATEMENT 6
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
SAILFISH POINT FOUNDATION, INC. 6601 S.E. HARBOR CIRCLE STUART, FL 34996	NONE	PRIVATE FOUNDATION	UNRESTRICTED DONATION	$ 2,000.
KID SMART 1920 CLIO STREET NEW ORLEANS, LA 70113	NONE	EXEMPT	UNRESTRICTED DONATION	1,500.

STATEMENT 6 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
HORATIO ALGER ASSOCIATION 99 CANAL CENTER PLAZA ALEXANDRIA, VA 22314	NONE	EXEMPT	UNRESTRICTED DONATION	$ 20,000.
ISIDORE NEWMAN SCHOOL 1903 JEFFERSON AVENUE NEW ORLEANS, LA 70115	NONE	EXEMPT	UNRESTRICTED DONATION	10,000.
THE VIRGINIA ROSANNE AMATO FOUNDATION 1615 POYDRAS STREET, 22ND FLOOR NEW ORLEANS, LA 70112	NONE	PRIVATE FOUNDATION	UNRESTRICTED DONATION	2,500.
VOLUNTEER SERVICE COUNCIL 40001 HIGHWAY 36 SOUTH BRENHAM, TX 77833	NONE	EXEMPT	UNRESTRICTED DONATION	500.
COPS II P.O. BOX 15497 NEW ORLEANS, LA 70175	NONE	EXEMPT	UNRESTRICTED DONATION	500.
BRIDGE HOUSE / GRACE HOUSE 4150 EARHART BLVD NEW ORLEANS, LA 70125	NONE	EXEMPT	UNRESTRICTED DONATION	2,000.
CHILDREN'S HOSPITAL 200 HENRY CLAY AVENUE NEW ORLEANS, LA 70118	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
ARCHBISHOP'S COMMUNITY APPEAL 1000 HOWARD AVENUE SUITE 1000 NEW ORLEANS, LA 70113	NONE	EXEMPT	UNRESTRICTED DONATION	2,000.
FAMILY SERVICE OF GREATER NEW ORLEANS 2515 CANAL STREET, SUITE 201 NEW ORLEANS, LA 70119	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
UNITED WAY OF GREATER NEW ORLEANS 2515 CANAL STREET NEW ORLEANS, LA 70119	NONE	EXEMPT	UNRESTRICTED DONATION	25,000.
LOUISIANA MUSEUM FOUNDATION 632 DUMAINE STREET NEW ORLEANS, LA 70116	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.

STATEMENT 6 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
NEW ORLEANS MUSEUM OF ART P.O. BOX 19123 NEW ORLEANS, LA 70179	NONE	EXEMPT	UNRESTRICTED DONATION	$ 7,000.
METROPOLITAN MUSEUM OF ART 1000 FIFTH AVENUE NEW YORK, NY 10028	NONE	EXEMPT	UNRESTRICTED DONATION	15,000.
LOUISIANA SPCA 1700 MARDI GRAS BLVD. NEW ORLEANS, LA 70114	NONE	EXEMPT	UNRESTRICTED DONATION	6,000.
NATIONAL D-DAY MUSEUM 945 MAGAZINE STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	3,500.
CRIME STOPPERS P.O. BOX 55249 METAIRIE, LA 70055	NONE	EXEMPT	UNRESTRICTED DONATION	10,000.
THE NOCCA INSTITUTE 2800 CHARTRES STREET NEW ORLEANS, LA 70117	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
LONGUE VUE HOUSE & GARDEN 7 BAMBOO ROAD NEW ORLEANS, LA 70124	NONE	EXEMPT	UNRESTRICTED DONATION	2,000.
FRIENDS OF LPB 7733 PERKINS ROAD BATON ROUGE, LA 70810	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
BOY SCOUTS OF AME SE LA COUNCIL PO BOX 1146 METAIRIE, LA 70004	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
AMERICAN LUNG ASSOCIATION IN LA PO BOX 7000 ALBERT LEA, MN 56007	NONE	EXEMPT	UNRESTRICTED DONATION	250.
YOUNG EISNER SCHOLARS 969 STONE CANYON ROAD LOS ANGELES, CA 90077	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
JEFFERSON PERFORMING ARTS SOCIETY 1118 CLEARVIEW PKWY METAIRIE, LA 70001	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.

STATEMENT 6 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
THE HISTORIC NEW ORLEANS COLLECTION 533 ROYAL STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	$ 1,000.
NEW ORLEANS CITY PARK 1 PALM DRIVE NEW ORLEANS, LA 70124	NONE	EXEMPT	UNRESTRICTED DONATION	12,500.
PRESERVATION RESOURCE CENTER OF NO 923 TCHOUPITOULAS STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	2,000.
XAVIER UNIVERSITY OF LA 1 DREXEL DRIVE NEW ORLEANS, LA 70125	NONE	EXEMPT	UNRESTRICTED DONATION	10,000.
DUCK'S UNLIMITED 193 BUSINESS PARK DRIVE STE. E RIDGELAND, MS 39157	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
WOMEN'S CANCER RESEARCH FOUNDATION - LA 10536 CULVER BLVD. CULVER CITY, CA 90232	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
LEGACY DONOR FOUNDATION PO BOX 15680 NEW ORLEANS, LA 70175	NONE	EXEMPT	UNRESTRICTED DONATION	2,000.
LIBERTY'S KITCHEN PO BOX 19293 NEW ORLEANS, LA 70179	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
PROJECT LAZARUS PO BOX 3906 NEW ORLEANS, LA 70177	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
HUMANE SOCIETY OF LOUISIANA PO BOX 740321 NEW ORLEANS, LA 70174	NONE	EXEMPT	UNRESTRICTED DONATION	2,000.
JOHN H. REAGAN HIGH SCHOOL ALUMNI ASSOC. PO BOX 7770 HOUSTON, TX 77270	NONE	EXEMPT	UNRESTRICTED DONATION	3,000.

STATEMENT 6 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
WYES 111 VETERANS BLVD. SUITE 250 METAIRIE, LA 70005	NONE	EXEMPT	UNRESTRICTED DONATION	$ 2,000.
METROPOLITAN CRIME COMMISSION 1615 POYDRAS STREET SUITE 1060 NEW ORLEANS, LA 70112	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
ST. MARY'S ASSUMPTION CHURCH 2030 CONSTANCE STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	12,500.
SOCIETY OF ST. VINCENT DE PAUL PO BOX 792880-2880 NEW ORLEANS, LA 70179	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
THE EDIBLE SCHOOL YARD 2319 VALENCE STREET NEW ORLEANS, LA 70115	NONE	EXEMPT	UNRESTRICTED DONATION	2,500.
STAIR 1545 STATE STREET SUITE A NEW ORLEANS, LA 70118	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
AMERICAN CANCER SOCIETY 2605 RIVER ROAD NEW ORLEANS, LA 70121	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
CANCER ASSOC OF GREATER NEW ORLEANS 501 BASIN STREET SUITE A NEW ORLEANS, LA 70112	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
LA WILDFOWL CARVERS PO BOX 7596 NEW ORLEANS, LA 70010	NONE	EXEMPT	UNRESTRICTED DONATION	1,500.
MARTIN MEMORIAL FOUNDATION PO BOX 9010 STUART, FL 34995	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
SOUTHERN DOMINICAN PROVINCE 1421 N. CAUSEWAY BLVD STE. 200 METAIRIE, LA 70001	NONE	EXEMPT	UNRESTRICTED DONATION	2,500.

STATEMENT 6 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
THE CHARTWELL CENTER 4239 CAMP STREET NEW ORLEANS, LA 70115	NONE	EXEMPT	UNRESTRICTED DONATION	$ 5,000.
NEW ORLEANS POLICE & JUSTICE FOUNDATION 400 POYDRAS STREET STE. 2105 NEW ORLEANS, LA 70130	NONE	EXEMPT	URESTRICTED DONATION	5,000.
BANNER M.D. ANDERSON CANCER CENTER 2946 E. BANNER GATEWAY DR GILBERT, AZ 85234	NONE	EXEMPT	UNRESTRICTED DONATION	25,000.
CAFE HOPE 1101 BARATARIA BLVD MARRERO, LA 70072	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
AMERICAN HEART ASSOCIATION PO BOX 840692 DALLAS, TX 75284	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
EASTER SEALS PO BOX 51179 NEW ORLEANS, LA 70151	NONE	EXEMPT	UNRESTRICTED DONATION	250.
BAYOU DISTRICT FOUNDATION 320 JULIA STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	12,500.
FRENCH QUARTER FESTIVALS 400 N. PETERS STREET STE. 205 NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
SYMPHONY CHORUS OF NEW ORLEANS PO BOX 50542 NEW ORLEANS, LA 70150	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
SAVE OUR CEMETERIES 501 BASIN STREET UNIT # 3C NEW ORLEANS, LA 70112	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
BREAKTHROUGH NEW ORLEANS 1903 JEFFERSON AVE NEW ORLEANS, LA 70115	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.

STATEMENT 6 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
JUNIOR ACHIEVEMENT GREATER NEW ORLEANS 5100 ORLEANS AVE NEW ORLEANS, LA 70124	NONE	EXEMPT	UNRESTRICTED DONATION	$ 1,000.
NEW ORLEANS OUTREACH PO BOX 792385 NEW ORLEANS, LA 70179	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
AMERICAN RED CROSS SOUTHEAST LA CHAPTER 2640 CANAL STREET NEW ORLEANS, LA 70119	NONE	EXEMPT	UNRESTRICTED DONATION	10,000.
SAVE THE OAKS PO BOX 15833 NEW ORLEANS, LA 70177	NONE	EXEMPT	UNRESTRICTED DONATION	2,000.
EASTER SEALS 213 CONGRESS AVE W PALM BEACH, FL 33409	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
THE CHEFS' CHARITY FOR CHILDREN 1522 CHIPPEWA STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	2,000.
ALZHEIMER'S ASSOCIATION 2605 RIVER ROAD NEW ORLEANS, LA 70121	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
LOUISIANA CHILDREN'S MUSEUM 420 JULIA STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
LOS ANGELES COUNTY MUSEUM OF ART 5905 WILSHIRE BLVD LOS ANGELES, CA 90036	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
LOUISIANA PHILHARMONIC ORCHESTRA 1010 COMMON STREET NEW ORLEANS, LA 70112	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
GIRL SCOUTS LOUISIANA EAST 841 S. CLEARVIEW PKWY NEW ORLEANS, LA 70121	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.

STATEMENT 6 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
NEIGHBORHOOD DEVELOPMENT FOUNDATION NO 1429 RAMPART S. STREET NEW ORLEANS, LA 70113	NONE	EXEMPT	UNRESTRICTED DONATION	$ 1,000.
THE ROOTS OF MUSIC 929 EUTERPE STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	2,500.
SPECIAL OLYMPICS 1000 E. MORRIS AVE NEW ORLEANS, LA 70403	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
LOUISIANA ENDOWMENT FOR THE HUMANTIES 938 LAFAYETTE STREET STE. 300 NEW ORLEANS, LA 70113	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
SAINT BERNARD PROJECT 8324 PARC PLACE CHALMETTE, LA 70043	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
CALIFORNIA AGRICULTURAL LEADERSHIP PO BOX 479 SALINAS, CA 93902	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
SAINT ELIZEBETH'S GUILD PO BOX 8394 METAIRIE, LA 70011	NONE	EXEMPT	UNRESTRICTED DONATION	5,000.
THE OGDEN MUSEUM OF SOUTHERN ART 925 CAMP STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
ST. MICHAEL SPECIAL SCHOOL 1522 CHIPPEWA STREET NEW ORLEANS, LA 70130	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
LOUISIANA CANCER RESEARCH CONSORTIUM 1430 TULANE AVE SL 68 NEW ORLEANS, LA 70112	NONE	EXEMPT	UNRESTRICTED DONATION	1,000.
OZANAM INN PO BOX 30565 NEW ORLEANS, LA 70190	NONE	EXEMPT	UNRESTRICTED DONATION	2,000.

STATEMENT 6 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
GRAND CANYON UNIVERSITY 3300 WEST CAMELBACK ROAD PHOENIX, AZ 85017	NONE	EXEMPT	SCHOLARSHIPS	$ 1,750.
NORTHERN ARIZONA UNIVERSITY SOUTH SAN FRANCISCO STREET FLAGSTAFF , AZ 86011	NONE	EXEMPT	SCHOLARSHIPS	3,500.
ARIZONA STATE UNIVERSITY 4701 WEST THUNDERBIRD ROAD GLENDALE , AZ 85306	NONE	EXEMPT	SCHOLARSHIPS	8,750.
UNIVERSITY OF ARIZONA 1428 E. UNIVERSITY BLVD TUCSON, AZ 85721	NONE	EXEMPT	SCHOLARSHIPS	7,000.
SCOTTSDALE COMMUNITY COLLEGE 9000 EAST CHAPARRAL ROAD SCOTTSDALE , AZ 85256	NONE	EXEMPT	SCHOLARSHIPS	1,750.
CREIGHTON UNIVERSITY 2500 CALIFORNIA PLAZA OMAHA, NE 68102	NONE	EXEMPT	SCHOLARSHIPS	1,750.
GLENDALE COMMUNITY COLLEGE 6000 WEST OLIVE AVENUE GLENDALE, AZ 85302	NONE	EXEMPT	SCHOLARSHIPS	5,250.
CHANDLER-GILBERT COMMUNITY COLLEGE 2626 EAST PECOS ROAD CHANDLER, AZ 85225	NONE	EXEMPT	SCHOLARSHIPS	1,750.
			TOTAL	$ 366,000.

SEE STATEMENT 9 FOR DETAIL OF SCHOLARSHIPS

FORM 990-PF STATEMENT 7

PART VII-B- STATEMENTS REGARDING ACTIVITIES FOR WHICH FORM 4720 MAY BE REQUIRED.

LINE 5a(4) ALL GRANTS TO PRIVATE FOUNDATIONS WERE MADE WITH TIMELY EXPENDITURE RESPONSIBILITY AGREEMENTS.

THE JAMES R. MOFFETT FAMILY FOUNDATION
1615 POYDRAS STREET • 22ND FLOOR
NEW ORLEANS, LOUISIANA 70112
TEL: (504) 309-9342
FAX: (504) 309-1145

CYNTHIA M. MOLYNEUX
EXECUTIVE DIRECTOR

September 25, 2012

Mr. John G. Amato
The Virginia Rosanne Amato Foundation
1615 Poydras Street, 22nd Floor
New Orleans, LA 70112

Dear Mr. Amato:

The James R. Moffett Family Foundation is pleased to inform you that its Board of Directors has approved a grant of $2,500.00 to The Virginia Rosanne Amato Foundation. Since your organization and the James R. Moffett Family Foundation are both private foundations, we must enter into an expenditure responsibility agreement.

Please confirm by signing below that you have agreed to the following:

- To repay any portion of the amount of the grant which is not used for charitable, scientific, literary, or educational purposes as defined under Internal Revenue Code (IRC) §501(c)(3), and more specifically for Scholarship Cost.
- To submit full and complete annual reports on the manner in which the funds are spent and the progress made in accomplishing the purpose of the grant and keep these reports for at least four years from the date of grant
- To maintain records of receipts and expenditures and to make your books and records available to us at reasonable times and keep these records for at least four years from the date of grant
- Not to use any of the funds
    - To carry on propaganda, or otherwise to attempt, to influence legislation
    - To influence the outcome of any specific public election, or to carry on, directly or indirectly, any voter registration drive
    - To make any grant to an individual (other than through a pre-approved scholarship program under IRC §4945(d)(3) or (4))
    - To undertake any activity for any purpose other than a charitable purpose (as specified in IRS §170(c)(2).

statement8

If this agreement meets with your approval, kindly sign it and return one copy to us. On behalf of the James R. Moffett Family Foundation, I extend every good wish for the success of this endeavor.

Sincerely,

Louise H. Moffett

Louise H. Moffett
Vice-President
The James R. Moffett Family Foundation

ACKNOWLEDGED BY:

John G. Amato
Date: September 25, 2012

STATEMENT 8

GIFT ACKNOWLEDGMENT FORM

In accordance with the Omnibus Revenue Reconciliation Act of 1993 (1993 Act), effective December 31, 1993, all gifts of $250 and above require substantiation of the contribution with a written letter from the donee organization. Therefore, please complete this form and return it within the next ten days with the following information:

- The amount of cash and a description (but not the value) of any property other than cash contributed;
- Whether the donee organization provided any goods or services in consideration, in whole or in part, for the contribution; and
- If goods or services are provided, include a description and good faith estimate of value of those goods and services.

I would like to confirm that on September 25, 2012, the organization noted below received a cash contribution from The James R. Moffett Family Foundation in the amount of $2,500.00.

No goods or services were provided for this donation.

The Virginia Rosanne Amato Foundation
(Name of Your Organization)

TAX I.D. #: 72-1320503

BY: ____________
(Signature)

John G. Amato
(Please Print Name)

TITLE: President

Please return this form within ten days of receipt of the contribution to:

The James R. Moffett Family Foundation
1615 Poydras Street, 22nd Floor
New Orleans, Louisiana 70112

STATEMENT 8

THE JAMES R. MOFFETT FAMILY FOUNDATION
1615 POYDRAS STREET • 22ND FLOOR
NEW ORLEANS, LOUISIANA 70112
TELEPHONE (504) 240-5480
FAX (504) 240-5488

January 26, 2012

Mrs. Kathryn L. Nichol, Treasurer
Sailfish Point Foundation, Inc.
6601 S.E. Harbor Circle
Stuart, FL 34996

Dear Mrs. Nichol:

The James R. Moffett Family Foundation is pleased to inform you that its Board of Directors has approved a grant of $2,000.00 to the Sailfish Point Foundation, Inc. Since your organization and the James R. Moffett Family Foundation are both private foundations, we must enter into an expenditure responsibility agreement.

Please confirm by signing below that you have agreed to the following:

- To repay any portion of the amount of the grant which is not used for charitable, scientific, literary, or educational purposes as defined under Internal Revenue Code (IRC) §501(c)(3), and more specifically for Scholarship Cost.
- To submit full and complete annual reports on the manner in which the funds are spent and the progress made in accomplishing the purpose of the grant and keep these reports for at least four years from the date of grant
- To maintain records of receipts and expenditures and to make your books and record available to us at reasonable times and keep these records for at least four years from the date of grant
- Not to use any of the funds
    - To carry on propaganda, or otherwise to attempt, to influence legislation
    - To influence the outcome of any specific public election, or to carry on, directly or indirectly, any voter registration drive
    - To make any grant to an individual (other than through a pre-approved scholarship program under IRC §4945(d)(3) or (4))
    - To undertake any activity for any purpose other than a charitable purpose (as specified in IRS §170(c)(2).

STATEMENT 8

If this agreement meets with your approval, kindly sign it and return one copy to us. On behalf of the James R. Moffett Family Foundation, I extend every good wish for the success of this scholarship program.

Sincerely,

Louise H. Moffett

Louise H. Moffett
Vice-President
The James R. Moffett Family Foundation

ACKNOWLEDGED BY:

Kathryn L. Nichol

Mrs. Kathryn L. Nichol, Treasurer
Date: January, 26 2012

STATEMENT 8

GIFT ACKNOWLEDGMENT FORM

1873

In accordance with the Omnibus Revenue Reconciliation Act of 1993 (1993 Act), effective December 31, 1993 all gifts of $250 and above require substantiation of the contribution with a written letter from the donee organization. Therefore, please complete this form and return it within the next ten days with the following information:

- The amount of cash and a description (but not the value) of any property other than cash contributed;
- Whether the donee organization provided any goods or services in consideration, in whole or in part, for the contribution; and
- If goods or services are provided, include a description and good faith estimate of value of those goods and services.

I would like to confirm that on Jan. 26, 2012, the organization noted below received a cash contribution from The James R. Moffett Family Foundation in the amount of $2,000.

No goods or services were provided for this donation.

Sailfish Point Foundation, Inc.
(Name of Your Organization)

TAX I.D. #: 65-0978271

BY: Kathryn L. Nichol
(Signature)

KATHRYN L. NICHOL
(Please Print Name)

TITLE: TREASURER

Please return this form within ten days of receipt of the contribution to:

The James R. Moffett Family Foundation
1615 Poydras Street, 22nd Floor
New Orleans, Louisiana 70112

FEB 14 2012

STATEMENT 8

THE JAMES R. MOFFETT FAMILY FOUNDATION
#72-1345770 YEAR ENDED 9/30/12

SCHEDULE BY COLLEGE / UNIVERSITY OF CHECKS MADE PAYABLE JOINTLY TO STUDENT AND COLLEGE / UNIVERSITY :

COLLEGE/ UNIVERSITY DATE	CHECK #	STUDENT'S NAME	$ AMOUNT
GRAND CANYON UNIVERSITY			
2/2/2012	1874	Morgan Ambrose	$ 1,750
NORTHERN ARIZONA UNIVERSITY			
2/2/2012	1875	Hilary Cacioppo	$ 1,750
8/7/2012	4009	Hilary Cacioppo	$ 1,750
			$ 3,500
ARIZONA STATE UNIVERSITY			
2/2/2012	1876	Taylor Caldwell	$ 1,750
8/7/2012	4010	Taylor Caldwell	$ 1,750
2/2/2012	1883	Jacob Seemann	$ 1,750
8/7/2012	4012	Jacob Seemann	$ 1,750
8/7/2012	4014	Kaitlyn Trotter	$ 1,750
			$ 8,750
UNIVERSITY OF ARIZONA			
2/2/2012	1911	Kiersten Gutier	$ 1,750
2/2/2012	1880	Caitlin Noll	$ 1,750
8/7/2012	4008	Sarah Ambrose	$ 1,750
8/7/2012	4013	Ashlee Taylor	$ 1,750
			$ 7,000
SCOTTSDALE COMMUNITY COLLEGE			
2/2/2012	1878	Karah Hess	$ 1,750
CREIGHTON UNIVERSITY			
2/2/2012	1879	Kathryn Keenan	$ 1,750
GLENDALE COMMUNITY COLLEGE			
2/2/2012	1881	Breanna Pope	$ 1,750
2/2/2012	1884	Katrina Taylor	$ 1,750
8/7/2012	4007	Morgan Ambrose	$ 1,750
			$ 5,250
CHANDLER-GILBERT COMMUNITY COLLEGE			
2/2/2012	1882	Glenda Ramirez	$ 1,750

Form **8868**
(Rev January 2013)
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 JAMES R. MOFFETT FAMILY FOUNDATION	Employer identification number (EIN) or 72-1345770
	Number, street, and room or suite no. If a P.O. box, see instructions. 1615 POYDRAS STREET 22ND FLOOR	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. NEW ORLEANS, LA 70112-1254	

Enter the Return code for the return that this application is for (file a separate application for each return) 04

Application Is For	**Return Code**	**Application Is For**	**Return Code**
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	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 ▶ HENRY DAUTERIVE

Telephone No. ▶ 504-309-9344 FAX No. ▶ 504-309-1145

- 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 MAY 15, 20 13, 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 10/1, 20 11, and ending 9/30, 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	$ 433
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	$ 433
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.