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**Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation****2012**

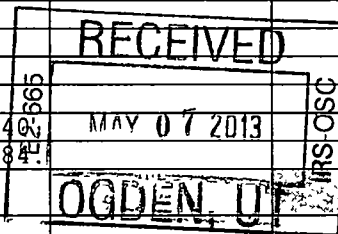
Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2012, or tax year beginning , 2012, and ending

YVONNE H. SIMARD FOUNDATION
6153 LEMANS DRIVE
CORPUS CHRISTI, TX 78414**A** Employer identification number
20-3411622**B** Telephone number (see the instructions)
361-985-6483**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)
\$ 5,448,128.
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)				
2 Ck <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
3 Interest on savings and temporary cash investments	26.	26.	26.	
4 Dividends and interest from securities	180,552.	180,552.	180,552.	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain/(loss) from sale of assets not on line 10	-11,413.			
b Gross sales price for all assets on line 6a	884,248.			
7 Capital gain net income (from Part IV, line 2)		0.		
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	169,165.	180,578.	180,578.	
ADMINISTRATIVE AND OPERATING EXPENSES				
13 Compensation of officers, directors, trustees, etc	30,900.	27,000.		3,900.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach sch)				
c Other prof fees (attach sch)				
17 Interest	40.			
18 Taxes (attach schedule)(see instrs) See Stmt 1	9,473.	4,684.		230.
19 Depreciation (attach sch) and depletion.				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) See Statement 2	867.	539.		328.
24 Total operating and administrative expenses. Add lines 13 through 23	41,280.	32,263.		4,458.
25 Contributions, gifts, grants paid Part XV	250,000.			250,000.
26 Total expenses and disbursements. Add lines 24 and 25	291,280.	32,263.	0.	254,458.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-122,115.			
b Net investment income (if negative, enter -0-)		148,315.		
c Adjusted net income (if negative, enter -0-)			180,578.	



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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing	8,350.	24,940.	24,940.
	2 Savings and temporary cash investments	43,523.	72,874.	72,874.
	3 Accounts receivable	9,305.		
	Less: allowance for doubtful accounts	11,229.	9,305.	9,305.
	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)	5,964,767.	5,798,635.	5,341,009.
	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)	6,027,869.	5,905,754.	5,448,128.	
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 and complete lines 27 through 31.	X		
	27 Capital stock, trust principal, or current funds	5,951,849.	5,951,849.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	76,020.	-46,095.	
	30 Total net assets or fund balances (see instructions)	6,027,869.	5,905,754.	
31 Total liabilities and net assets/fund balances (see instructions)	6,027,869.	5,905,754.		

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	6,027,869.
2 Enter amount from Part I, line 27a	2	-122,115.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	5,905,754.
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	5,905,754.

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)
1 a See Statement 3				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(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	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss).	<div style="border: 1px solid black; padding: 2px; display: inline-block;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>		2	-11,413.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px; display: inline-block;"> If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 </div>		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☒ 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))
2011	212,753.	5,168,179.	0.041166
2010	249,154.	5,192,844.	0.047980
2009	251,903.	4,532,906.	0.055572
2008	202,753.	5,718,697.	0.035454
2007	300,763.	6,644,735.	0.045263

2 Total of line 1, column (d)	2	0.225435
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	0.045087
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	5,368,342.
5 Multiply line 4 by line 3	5	242,042.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,483.
7 Add lines 5 and 6	7	243,525.
8 Enter qualifying distributions from Part XII, line 4	8	254,458.

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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,483.
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	1,483.
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	1,483.
6 Credits/Payments		
a 2012 estimated tax pmts and 2011 overpayment credited to 2012	6 a	3,121.
b Exempt foreign organizations – tax withheld at source	6 b	
c Tax paid with application for extension of time to file (Form 8868)	6 c	
d Backup withholding erroneously withheld	6 d	
7 Total credits and payments. Add lines 6a through 6d	7	3,121.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	1,638.
11 Enter the amount of line 10 to be Credited to 2013 estimated tax 1,638. 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		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?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
4 a 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?		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		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, column (c), and Part XIV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) TX		
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 2012 or the taxable year beginning in 2012 (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

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>WILLIE J. KOSAREK</u> Telephone no <u></u> Located at <u>6153 LEMANS DRIVE CORPUS CHRISTI TX</u> ZIP + 4 <u>78414</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 <u>N/A</u>	15		N/A
16	At any time during calendar year 2012, 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 <u></u>				

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
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input 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 <u></u>	1 b	N/A
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 2012?	1 c	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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? If 'Yes,' list the years <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions)	2 b	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 <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>		
3 a 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 2012 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 2012)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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 2012?	4 b	X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

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

6b

X

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

☐ Yes ☒ No

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

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation (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
WILLIE J. KOSAREK 6153 LEMANS DRIVE CORPUS CHRISTI, TX 78414	President 12.00	30,000.	0.	0.
CONNIE V. KOSAREK 6153 LEMANS DRIVE CORPUS CHRISTI, TX 78414	Director 0	300.	0.	0.
JAY A. KOSAREK 3526 CRESWELL CT MISSOURI CITY, TX 77459	Director 0	300.	0.	0.
WILLIE J. KOSAREK 6153 LEMANS DRIVE CORPUS CHRISTI, TX 78414	Director 0	300.	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 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	1 a	5,439,511.
b	Average of monthly cash balances	1 b	10,582.
c	Fair market value of all other assets (see instructions)	1 c	
d	Total (add lines 1a, b, and c)	1 d	5,450,093.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,450,093.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	81,751.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,368,342.
6	Minimum investment return. Enter 5% of line 5	6	268,417.

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	268,417.
2a	Tax on investment income for 2012 from Part VI, line 5	2 a	1,483.
b	Income tax for 2012 (This does not include the tax from Part VI.)	2 b	
c	Add lines 2a and 2b	2 c	1,483.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	266,934.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	266,934.
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	266,934.

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	1 a	254,458.
b	Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	254,458.
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	1,483.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	252,975.

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 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				266,934.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			123,165.	
b Total for prior years 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2012				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 254,458.				
a Applied to 2011, but not more than line 2a			123,165.	
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 2012 distributable amount				131,293.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				135,641.
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 2007 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				
e Excess from 2012				

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 2012, 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)

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 5				
Total			3 a	250,000.
b Approved for future payment				
Total			3 b	

Part XVI-A: Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	26.	
4	Dividends and interest from securities			14	180,552.	
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					-11,413.
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)				180,578.	-11,413.
13	Total. Add line 12, columns (b), (d), and (e)				13	169,165.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
FOREIGN TAXES WITHHELD	\$ 2,619.	\$ 2,619.		
INCOME TAX	4,559.			
PAYROLL TAXES	2,295.	2,065.		\$ 230.
Total	\$ 9,473.	\$ 4,684.	\$ 0.	\$ 230.

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
BROKER FEES	\$ 212.	\$ 212.		
MEETING EXPENSE	222.	111.		\$ 111.
MILEAGE	333.	166.		167.
Office Supplies	100.	50.		50.
Total	\$ 867.	\$ 539.	\$ 0.	\$ 328.

Item	(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
1	3300 KINGROSS GOLD CORP	Purchased	Various	11/27/2012
2	38165.455 AMERICAN BALANCED FUND	Purchased	Various	11/27/2012
3	1.0562 BLACKROCK CREDIT ALLOC INCOME TR	Purchased	Various	12/11/2012
4	1301 CHINA LIFE INS CO	Purchased	Various	11/27/2012
5	2250 ZOLTEK COS INC	Purchased	Various	11/27/2012
6	CAPITAL GAIN DIVIDENDS-VARIOUS	Purchased	Various	12/31/2012

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i) - (j)	(l) Gain (Loss)
1	34,006.		58,220.	-24,214.				\$ -24,214.
2	767,507.		683,300.	84,207.				84,207.
3	15.		27.	-12.				-12.
4	56,754.		98,538.	-41,784.				-41,784.
5	16,127.		55,576.	-39,449.				-39,449.
6	9,839.		0.	9,839.				9,839.
							Total	\$ -11,413.

Client SIMFOUND

YVONNE H. SIMARD FOUNDATION

20-3411622

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Statement 4
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program:

Name: WILLIE J. KOSAREK

Care Of:

Street Address: 6153 LEMANS DRIVE

City, State, Zip Code: CORPUS CHRISTI, TX 78414

Telephone: 361-985-6483

E-Mail Address:

Form and Content:

CHARITABLE ORGANIZATIONS SHOULD SUBMIT INFORMATION REGARD TO PROGRAMS FOR WHICH GRANTS ARE REQUESTED

Submission Deadlines:

NOVEMBER 1

Restrictions on Awards:

CONTRIBUTIONS ARE GENERALLY RESTRICTED TO CHARITABLE ORGANIZATIONS IN SOUTH TEXAS AREA. THE FOUNDATION WILL RESPOND TO APPLICANTS ONLY IF CONTRIBUTIONS ARE APPROVED.

Statement 5
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
DEL MAR COLLEGE FOUNDATION, INC 101 BALDWIN CORPUS CHRISTI, TX 78401	N/A	PUBLIC	ENDOWMENT/SCHOL ARSHIPS	\$ 50,000.
CHURCH OF CHRIST INDIA MISSIONS P.O. BOX 1448 HAMILTON, AL 35570	N/A	PUBLIC	SUPPORT MISSION PROGRAM	2,500.
SALVATION ARMY P.O. BOX 2507 CORPUS CHRISTI, TX 78403	N/A	PUBLIC	SUPPORT PROGRAMS	4,000.
CHRISTUS SPOHN HEALTH SYSTEM FOUNDATION 600 ELIZABETH STREET CORPUS CHRISTI, TX 78404	N/A	PUBLIC	SUPPORT MEDICAL CARE PROGRAM	35,000.
HABITAT FOR HUMANITY-CORPUS CHRISTI P.O. BOX 3032 CORPUS CHRISTI, TX 78463	N/A	PUBLIC	SUPPORT PROGRAMS	2,500.
RONALD MCDONALD HOUSE CHARITIES OF CORPU 3402 FT WORTH STREET CORPUS CHRISTI, TX 78411	N/A	PUBLIC	SUPPORT PROGRAMS	2,500.

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Statement 5 (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
RONALD MCDONALD HOUSE CHARITIES OF HOUST 1907 HOLCOMB BLVD HOUSTON, TX 77030	N/A	PUBLIC	SUPPORT PROGRAMS	\$ 2,500.
SUNNY GLENN CHILDRENS HOME P.O. BOX 1373 SAN BENITO, TX 78586	N/A	PUBLIC	BUILDING & RENOVATION PROGRAM	5,000.
DRISCOLL CHILDRENS HOSPITAL DEVELOPMENT 3533 SOUTH ALAMEDA STREET CORPUS CHRISTI, TX 78411	N/A	PUBLIC	CHILDRENS HEALTH PROGRAMS	10,000.
SUGAR GROVE CHRISTIAN SCHOOL 11600 WEST AIRPORT BLVD MEADOWS PLACE, TX 77477	N/A	PUBLIC	BUILDING PROGRAM	35,000.
SHARE CENTER 103 JONES TERRELL, TX 75160	N/A	PUBLIC	FOOD PROGRAM	15,000.
KINGS CROSSING CHURCH OF CHRIST 5901 YORKTOWN BLVD CORPUS CHRISTI, TX 78414	N/A	PUBLIC	JAIL PRISON MINISTRY ENDOWMENT FUND	15,000.
NEW LIFE BEHAVIOR MINISTRIES P.O. BOX 72188 CORPUS CHRISTI, TX 78472	N/A	PUBLIC	SUPPORT NEW CIRCULUMS	5,000.
TEXAS STATE ACQUARIUM 2710 NORTH SHORELINE CORPUS CHRISTI, TX 78402	N/A	PUBLIC	SUPPORT PROGRAMS	2,500.
MISSION OF MERCY, INC P.O. BOX 8341 CORPUS CHRISTI, TX 78468	N/A	PUBLIC	SUPPORT PROGRAMS	1,000.
THE SUNSHINE KIDS FOUNDATION 2814 VIRGINIA STREET HOUSTON, TX 77098	N/A	PUBLIC	SUPPORT KID'S PROGRAMS	2,500.
LIFELINE CHAPLAINCY 1415 SOUTHMORE BLVD. HOUSTON, TX 77004	N/A	PUBLIC	SUPPORT PROGRAMS	5,000.

Client SIMFOUND

YVONNE H. SIMARD FOUNDATION

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Statement 5 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
SECOND MILE MISSION CENTER 504 FM 1092, SUITE 1 STAFFORD, TX 77477	N/A	PUBLIC	SUPPORT PROGRAMS	\$ 5,000.
WOMEN'S SHELTER OF SOUTH TEXAS P.O. BOX 3368 CORPUS CHRISTI, TX 78463	N/A	PUBLIC	SUPPORT PROGRAMS	2,000.
LILIAS PLACE, INC. P.O. BOX 1553 STAFFORD, TX 77497	N/A	PUBLIC	SUPPORT PROGRAMS	20,000.
COMMUNITIES IN SCHOOLS OF THE COASTAL BE P.O. BOX 331203 CORPUS CHRISTI, TX 78463	N/A	PUBLIC	SUPPORT PROGRAMS	1,000.
STILL CREEK BOYS RANCH, INC. 6055 HEARNE RD. BRYAN, TX 77808	N/A	PUBLIC	SUPPORT PROGRAMS	1,000.
CORPUS CHRISTI METRO MINISTRIES P.O. BOX 4899 CORPUS CHRISTI, TX 78469	N/A	PUBLIC	SUPPORT PROGRAMS	1,000.
KINGS CROSSING CHURCH OF CHRIST 5901 YORKTOWN BLVD CORPUS CHRISTI, TX 78414	N/A	PUBLIC	BUILDING FUND	25,000.

Total \$ 250,000.

YVONNE H. SIMARD FOUNDATION
FORM 990-PF
INVESTMENT IN SECURITIES 12/31/2012

SHARES	DESCRIPTION	COST	MARKET VALUE
8065	BLACKROCK ENHANCED CAP/INCOME	140,026	100,167
13600	BLACKROCK ENHANCED DIVID	170,637	97,648
3300	CALAMOS STRAT TOTAL RETURN FD	42,652	32,373
2000	COHEN & STEERS REIT & PFD INCM	44,989	33,980
2500	COHEN & STEERS INFRACTURE FD	41,208	46,875
7005	COHEN & STEERS QUALITY INCOME RE	140,710	71,171
3000	MACQUARIE GL INFRSTRC TR TOT RET	75,000	57,210
2500	MACQUARIE/FTG/UTL D&I	50,735	38,125
5000	NASDAQ PREMIUM INCOME & GROWTH	68,679	75,400
7000	AGIC CONV & INCOME FD II	98,560	55,510
6034	BLACKROCK CREDIT ALLCT INCOME TR	140,048	82,847
2250	ZOLTEK COS, INTL	55,575	17,437
2330	MINDRAY MED INTL	72,206	76,191
2100	BLACKROCK INTL GROWTH	17,863	15,435
2100	EATON VANCE TAX MG	17,302	18,501
9868.046	GROWTH FUND OF AMERICA	300,000	338,967
9235.529	INVESTMENT CO OF AMERICA	300,000	278,544
9420.628	WASHINGTON MUTUAL INV FD	300,000	294,018
6838.284	EUROPACIFIC GROWTH FD	300,000	281,874
29028.26	AMERICAN GLOBAL BAL FD	767,507	776,216
12411.46	CAPITAL INCOME BUILDER	683,300	654,953
36505.13	INCOME FD OF AMERICA	683,300	659,283
6433.052	NEW WORLD FUND	309,633	350,537
1600	AGNICO EAGLE MINES LTD	102,047	83,936
3000	EXXON MOBIL CORP	217,857	259,650
2000	AMERICAN CAP AGY CORP	58,319	57,800
4000	NUVEEN MLP OTAL RET FD	71,152	70,800
10000	BLACKROCK REST & COMMODIT STRAT	184,924	128,000
1100	SILVER WHEATON CORP	43,886	39,688
4200	ANNALY CAP MGMT INC	75,558	58,968
22300	CHIMEERA INVESTMENT CORP	71,851	58,203
3300	KINROSS GOLD CORP	58,221	32,076
1000	VALERO ENERGY CORP	19,750	34,120
2600	HATTERAS FINL CORP	75,140	64,506
	TOTAL	5,798,635	5,341,009