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## Form **990-PF**

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 Open to public Inspection

Department of the Treasury Internal Revenue Service

FOL	caien	dar year 2012 or tax year beginning			, and ending		
Nar	ne of	foundation				A Employer identification	n number
В	RU	CKNER FAMILY FOUNDA	TION	, INC.		75-1686688	3
		nd street (or P O box number if mail is not delivere		<del></del>	Room/suite	B Telephone number	
2	2	EDGEWATER				806-355-82	241
		own, state, and ZIP code				C If exemption application is p	
		RILLO, TX 79106					
		all that apply: Initial return		Initial return of a fo	rmer public charity	D 1 Foreign organization	s, check here
		Final return		Amended return			
		Address change		Name change		2 Foreign organizations mi check here and attach or	eeting the 85% test,
H (	heck	<u></u>		kempt private foundation		E If private foundation sta	
	_	ction 4947(a)(1) nonexempt charitable trus		Other taxable private founda	tion	under section 507(b)(1	
l Fa				ng method. X Cash	Accrual	F If the foundation is in a	
		Part II, col (c), line 16)		ther (specify)		under section 507(b)(1	F==1
	\$	2.015,276. (Pai	t I, colu	mn (d) must be on cash b	pasis)	, , ,	N- N
Pa	art I			(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
`		<ul> <li>(The total of amounts in columns (b), (c), and (d) in necessarily equal the amounts in column (a).)</li> </ul>	nay not	expenses per books	income	income	for charitable purposes (cash basis only)
 	1	Contributions, gifts, grants, etc., received		379,951.		N/A	
2	2	Check In the foundation is not required to attact	Sch B			-	
Į.	3	Interest on savings and temporary cash investments		10,154.	10,154.		STATEMENT 1
コスララマンか	4	Dividends and interest from securities		34,560.	34,560.		STATEMENT 2
	5a	Gross rents					
	ь	Net rental income or (loss)					
_		Net gain or (loss) from sale of assets not on line 10	)	2,351.			
ğ	ь	Gross sales price for all assets on line 6a 125, 8	43.			RECEIVE	
Revenue	7	Capital gain net income (from Part IV, line 2)			2,351.		08
ď	8	Net short-term capital gain				8 MAY 2 2 2	013 9
	9	Income modifications		· · · · · · · · · · · · · · · · · · ·		Z	
	10a	Gross sales less returns and allowances				000511	
	Ι.	Less Cost of goods sold				OGDEN,	
	С	Gross profit or (loss)					
	11	Other income					
	12	Total Add lines 1 through 11		427,016.	47,065.		
	13	Compensation of officers, directors, trustees, etc		0.	0.		0.
	14	Other employee salaries and wages					
		Pension plans, employee benefits					
Ses	16a	Legal fees					
e.	b	Accounting fees STMT	3	1,950.	975.		975.
Ä	C	Other professional fees					
.Xe	17	Interest					
trat	18	Taxes STMT	4	1,140.	250.		0.
nis.	19	Depreciation and depletion					
톭	20	Occupancy					
and Administrative Expenses	21	Travel, conferences, and meetings			<del></del>		
and	22	Printing and publications	_		<del></del>	<b> </b>	<u> </u>
ğ	23	Other expenses STMT	5	1,321.	1,321,	ļ <u>.</u>	0.
rati	24	Total operating and administrative			<b>.</b>		
Operating	-	expenses. Add lines 13 through 23		4,411.	2,546.	ļ	975.
	25	Contributions, gifts, grants paid		78,385.			78,385.
	26	Total expenses and disbursements					F0.555
	<b> </b>	Add lines 24 and 25		82,796.	2,546.		79,360.
	27	Subtract line 26 from line 12:					
	1	Excess of revenue over expenses and disburseme		344,220.	44 540		
		Net investment income (if negative, enter -0-	)		44,519.		
	C	Adjusted net income (if negative, enter -0-)		<u> </u>		N/A	

BRUCKNER FAMILY FOUNDATION, INC.

75-1686688

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Form **990-PF** (2012)

BRUCKNER FAMILY FOUNDATION, INC.

2-story brick w		nd(s) of property sold (e.g or common stock, 200 sh			( <b>b)</b> How P - Pu D - Do	acquired irchase onation	(c) Date (mo., c	acquired lay, yr.)	(d) Date sold (mo., day, yr.)
1a `	***								
b SEE ATTACHEI	STAT	PEMENT							
C									
d									
<u>e</u>		<del></del>			<u> 1</u>				L
(e) Gross sales price	(f) [	Pepreciation allowed (or allowable)		t or other basis xpense of sale				ain or (loss s (f) minus i	
<u>a</u>	ļ. <u> </u>								
<u>b</u>	ļ							<del></del>	
C	ļ		<u> </u>						
d	ļ								
e 125,843.			<u> </u>	123,49	92.				2,351
Complete only for assets show	ing gain in o	column (h) and owned by	the foundation	on 12/31/69				Col (h) gain	
(i) F M.V. as of 12/31/69					Losses	not less that (from col. (	n -U-) <b>or</b> h)) 		
a									
b									
С									
d									
е									2,351
		C If gain, also enter	r in Part I line	<del></del>	7				
2 Capital gain net income or (net o	apital loss)	If gain, also enter If (loss), enter -0	- in Part I. line	, 7	}   2				2,351
, ,	,	•		•					
Net short-term capital gain or (lo if gain, also enter in Part I, line 8			10 (6):		1				
If (loss), enter -0- in Part I, line 8		·)·			) 3			N/A	
Part V Qualification	Jnder S	ection 4940(e) for	Reduced	Tax on Net	Inves	tment Inc	ome	-1/	
Was the foundation liable for the se	alify under s	section 4940(e) Do not co	mplete this pa	rt		···			Yes X No
1 Enter the appropriate amount in	each colur	nn for each year; see the i	nstructions bet	ore making any e	entries.			<del></del>	-/4\
(a) Base period years Calendar year (or tax year beginr	ning in)	(b) Adjusted qualifying dis		Net value of no				Distrit (col. (b) div	(d) Oution ratio yided by col. (c))
2011			0,825.			43,478			.09756
2010			0,390.			30,756			.08969
2009			5,212.			81,654			.07877
2008			8,033.			25,258			.32298
2007		4	5,149.		1,4	42,140	) .		.03130
2 Total of line 1, column (d)							2		.620320
3 Average distribution ratio for the	5-year bas	e period - divide the total	on line 2 by 5,	or by the number	of years				
the foundation has been in exist	ence if less	than 5 years					3		.12406
									<u></u> -
4 Enter the net value of noncharita	able-use ass	sets for 2012 from Part X.	line 5				4		1,882,567
		,						<u> </u>	<u>,, </u>
5 Multiply line 4 by line 3							5		233,559
Westphy line of by line o							٠,		
6 Enter 1% of net investment inco	me (1% of	Dart I. line 27h)					6		445
Cotter 176 Of the Hivestille Hill Hill	110 01 1 201	i ait i, iiio 270)					-		==3
7 Add has Food C							-		234 004
7 Add lines 5 and 6							7	-	234,004
8 Enter qualifying distributions fro	ım Part VII	line 4					8		79,360
, , , <del>,</del>								<u> </u>	19,300
If line 8 is equal to or greater that See the Part VI instructions.	an line 7, ch	eck the box in Part VI, line	1b, and comp	lete that part usir	ng a 1% ta	ax rate			

	1990-PF (2012) BRUCKNER FAMILY FOUNDATION, INC.		1686			Page 4
	irt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or	4948	· see	nstru	CTIOI	<u>15)</u>
1a	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 instructions)					
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here   and enter 1%	1_1_			8	<u>90.</u>
	of Part I, line 27b					
C	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b).					
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2				<u>0.</u>
3	Add lines 1 and 2	3			8	90.
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	L		8	90.
6	Credits/Payments;	1	ł			
a	2012 estimated tax payments and 2011 overpayment credited to 2012 6a 1,080	<u>.</u>				
b	Exempt foreign organizations - tax withheld at source 6b					
C	Tax paid with application for extension of time to file (Form 8868)					
d	Backup withholding erroneously withheld 6d		1			
	Total credits and payments. Add lines 6a through 6d	7	1		1,0	80.
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	8				
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9				
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10			1	90.
	Enter the amount of line 10 to be: Credited to 2013 estimated tax	11				0.
	rt VII-A Statements Regarding Activities	<u> </u>				
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervel	ne in			Yes	No
	any political campaign?			1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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 publis					
	distributed by the foundation in connection with the activities					
c	Did the foundation file Form 1120-POL for this year?			1c		х
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			"		
Ū	(1) On the foundation. > \$ 0. (2) On foundation managers. > \$	_				
۵	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation	<u>•</u>				
٠	managers. > \$ 0.					
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2		X_
2	If "Yes," attach a detailed description of the activities			-		
2	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation	Or				
J	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	, 01		3		<u>X</u>
4.	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year?	N	/A	4b		- A
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	14	<i>,</i>	5	_	X
J	If "Yes," attach the statement required by General Instruction T.			3		
_	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:					
6				1		
	By language in the governing instrument, or      By state language in the governing instrument, or	ato love				
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the statement of the construction of the conflict with the statement of the conflict with	ale law			v	
_	remain in the governing instrument?			6	X	
1	Did the foundation have at least \$5,000 in assets at any time during the year?			7	X	
_	If "Yes," complete Part II, col (c), and Part XV					
Ва	Enter the states to which the foundation reports or with which it is registered (see instructions)					
	TX					
þ	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)			1	,,	
	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 calculation within the meaning of section 4942(j)(3) or 4942(j)(5) for calculation within the meaning of section 4942(j)(3) or 4942(j)(5) for calculation within the meaning of section 4942(j)(3) or 4942(j)(5) for calculation within the meaning of section 4942(j)(3) or 4942(j)(5) for calculation within the meaning of section 4942(j)(3) or 4942(j)(5) for calculation within the meaning of section 4942(j)(3) or 4942(j)(5) for calculation within the meaning of section 4942(j)(3) or 4942(j)(5) for calculation within the meaning of section 4942(j)(5) f	alendar				
	year 2012 or the taxable year beginning in 2012 (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		ΙX

Part VII-A  Statements Regarding Activities (continued)   11   1   1   1   1   1   1   1   1	orm	1990-PF (2012) BRUCKNER FAMILY FOUNDATION, INC. 75-168	<u> 36688</u>		Page 5
section 512(b)(13)? If Yes, fatish schedule (see astructions)  Doith be foundation make a distribution to a doors advest fund over which the foundation or a disqualified person had advisory privileges?  12	Pa	art VII-A Statements Regarding Activities (continued)			
section 512(b) (13)? If Yes, faltach schedule (see instructions)  Doithe foundation make a distribution to a donor advised fund over which the foundation or a dequalified person had advisory privileges?  12 X  13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  14 The books are in care of PRROWN, GRAHAM & CO., P.C. Telephona no. 80.6–355–8241  15 Section 4947(a)(1) nonexempt charitability trusts fitting from 590.9F in fleu of Form 1041 - Check here and either the annual returns and exemption application?  15 A farty time during calendary year 2012, did the foundation have an intensi in or a signature or other authority over a bank, securities, or other financial account in a foreign country?  See the instructions for exceptions and fitting requirements for Form 10 F 90-22.1, II "Yes," enter the name of the foreign country.  Part VIII-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.  10 Lings by eyes of the foundation (either directly or indirectly).  11 Figage in the sale or exchange, or teasing of property with a disqualified person?  12 Yes   No   Yes   Yes   No   Yes	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
12 Do the foundation make a distribution to a donor adweed fund over which the foundation or a dequalified person had advisory privileges?  13 Dot the foundation comply with the public inspection requirements for its annual returns and exemption application?  Website address ► N/A  13 The books are in earl of ► BROWN, GRAHAM & CO., P.C. Telephone not ► 80.6 - 355 - 82.41  Located at ► 74.31 CONTTINENTAL PARKWAY, AMARILLIO, TX  78-74 ► 79.119  Section 497((1)) nonexempt charable trusts timing form 990-Fin lived of Form 1041. Chick there and enter the amount of tax-exempt interest received or accrued during the year  8 A day where during calendar year 2012, did the loundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign occurity?  8 See this instructions for exceptions and filling requirements for Form TD F 90-22.1. If Yes, "enter the name of the foreign country."  9 See this instructions for exceptions and filling requirements for Form TD F 90-22.1. If Yes, "enter the name of the foreign country."  18 It is a second of the second of the filling of the second of the Yes. The second of the filling of the filling of the filling of the second of th			11		Х
# Yes, attach statement (see instructions)  **Note:** Address***  **Note:** **Note:**  **Website address***  **Note:**	12				
13 Dut he foundation comply with the public respection requirements for its annual returns and exemption application?   13 X			12		х
Website address ► N/A  The books are in cate of ► BROWN, GRAHAM & CO., P.C. Telephone no. ► 806-355-8241  Located at ► 7431 CONTINENTAL PARKWAY, AMARILLO, TX  2P-4 ▼79119  15 Section 4947(a)(1) nonexempt charitable trusts thing form 990-Pri in leu of Form 1041 - Check here and enter the amount of tax-exempt interest received on accrued during the year  16. Alray time during calendary year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial securities, or other financial securities for Which Form 4720 May Be Required  File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  10. Journal the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend morely to, or otherwise extend credit to (or accept it from) a dequalified person?  (3) Formath goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (for make any of either available for the benefit or use of a disqualified person)  (6) Agree to pay money or property to a government official? (Exception Check No' if the foundation engage in a make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  b) If any answer is "Yes" to lat[1]-(6), did any of the acts file to qualify under the exceptions described in Regulations section 53-49(1)-30 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organi	13	·		Х	
14. The books are made of ▶ BROWN, GRAHAM & CO., P.C. Telephone no ▶ 806-355-8241   Located at ▶ 7431 CONTINENTAL PARKWAY, AMARILLO, TX  15. Section 4947(a)(1) nonexempt charitable trusts timing form 990-Prin lieu of form 1041-Check here and enter the amount of tax-exempt interest received or accrued during the year  16. At any time during calendar year 2012, dull the toundation have an interest in or a singulature or other authority over a bank, vosecurines, or other financial account in a longing country?  16. At any time during calendar year 2012, dull the toundation have an interest in or a singulature or other authority over a bank, vosecurines, or other financial account in a longing country?  16. At any time during calendar year 2012, dull the toungation of the financial account in a longing country?  17. Section 4720 if any item is checked in the "Yes" column, unless an exception applies.  18. The property of the property with a disqualified person?  19. Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  19. Furnath goods, services, or facilities to (or accept them from) a disqualified person?  19. Furnath goods, services, or facilities to (or accept them from) a disqualified person?  19. Furnath goods, services, or facilities to (or accept time from) a disqualified person?  19. Furnath goods, services, or facilities to (or accept time from) a disqualified person?  19. Furnath goods, services, or facilities to (or accept time from) a disqualified person?  19. Furnath goods, services, or facilities to (or accept time from) a disqualified person?  19. Furnath goods, services, or facilities to (or accept time from) a disqualified person?  19. Furnath goods, services, or facilities to (or accept time from) a disqualified person?  20. Furnath goods, services, or facilities to describe a person from the acception described in facilities and the person from the facilities of the foreign foreign from the facilities of the foreign foreign foreign from the			<u></u>		
Located at M 74 31 CONTINENTAL PARKWAY, AMAILLO, TX    15 Section 4947(a)(1) nonexempt charitable treats filing form 990-PF in two of Form 1041-Check here and enter the amount of tax-exempt inflients freezeded or accreed during the year of the amount of tax-exempt inflients freezeded or accreed during the year of the amount of tax-exempt inflients freezeded or accreed during the year of the filing freezed or accreed during the year of the filing freezed or accreed during the year of the financial accountry?    16 All any time during calendary year 2012, did the foundation have an interest in or a signature or other authority over a bank, so the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes, enter the name of the foreign country    16 All any time of the financial science of the first filing freezed or the filing fil	14		355-8	241	
15 Section 4947(a)(1) nonexempt charitable trusts fing form 990-PF in leu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year of the form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year of the form 1041 - Check here and the foreign country.  16 A far year 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.  17 Sea the neithruchies for exemptions and filting requirements for Form 10 F 90-22.1, II "Yes," enter the name of the foreign country.  18 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.  1a During the year did the foundation (either directly or indirectly):  1b Gapan in the sale or exchange, or lessing of property with a disqualified person?  1c Surming the year did the foundation (either directly or indirectly):  1c Gapan in the sale or exchange, or lessing of property with a disqualified person?  2c Surming the year did the foundation (either directly or indirectly):  1c Gapan in the sale or exchange, or lessing of property with a disqualified person?  2c Surming the year of the foundation foundation or, or otherwise extend credit to (or accept in firm) a disqualified person?  2c Surming the year or year of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available or the secondary of the secondary of the secondary of the foundation section 34.941(a) or in a current notice regarding disaster assistance (see instructions)?  1b I day answer is Tvs' to	17				
and enter the amount of tax-exempt interest received or accrued during the year    Total any time during calendar year 2012, dut the toundation have an interest in or a signature or other authority over a bank, securities, or other inancial account in a foreign country?	15		<u> </u>	_	ΤĪ
No securities, or other financial account in a foreign country	13		N	/ <b>/</b>	
Sec the instructions for exceptions and thing requirements for Form TD F 90-22.1. If Yes, "enter the name of the foreign country   Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required   File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.   Yes   No   1a During the year did the foundation (either directly or indirectly):   (1) Engage in the sale or exchange, or leasing of property with a disqualified person?   Yes   X   No   2   Borrow money from, lend money to, or otherwise extend credit to (or accept it from)   a disqualified person?   Yes   X   No   (2)   Borrow money from, lend money to, or otherwise extend credit to (or accept them from) a disqualified person?   Yes   X   No   (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?   Yes   X   No   (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?   Yes   X   No   (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of adequalified person)?   Yes   X   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   X   No   Ves   X	16				No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes,* enter the name of the foreign country  Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  FILE Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1a During the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leaving of property with a disqualified person?   Yes   X   No    (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?   Yes   X   No    (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?   Yes   X   No    (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?   Yes   X   No    (5) Transfer any income or assets to a disqualified person of make any of either available for the benefit or use of a disqualified person of make any of either available for the benefit or use of a disqualified person of make any of either available for the benefit or use of a disqualified person of make any of either available for the benefit or use of a disqualified person of make any of either available for the benefit or use of a disqualified person of make any of either available for the benefit or use of a disqualified person of make any of either available for the benefit or use of a disqualified person of make any of either available for the benefit or use of a disqualified person of make any of either available for a period after termination of government service, if terminating within 90 days.)  b If any service is "Yes" to Ital (1)6, did any of the acts fall to quality under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?  C Did the foundation engage in a pror year in any of the acts fall to quality under the exceptions described in Regulations.  1b Available to distribute income (section 4942(a)(2) or the tax	10		1 40	163	l
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.  1a During the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  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 53.491 (i)-3 or in a current notice regarding dissater 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 2012?  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(i)(3) or 4942(i)(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   If years   If year   If			16	<u> </u>	
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(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.4941(a)-3 or in 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 2012?  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(i)(3) or 4942(i)(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 beginning a before 2012?  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 or assets) to the year's undistributed income? (If applying section 4942(a)(2) all years listed, answer 'No' and attach statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to any of the year's listed in 2a, list the years here  Agy 26, 1965; (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 la	18		-   '	}	
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(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)?  (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.)  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 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 2012?  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(i)(3) or 4942(i)(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?  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.)  b If "Yes," list the years 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 as a fessilit of the foundation of make any investment in a prior year (but after December 31, 1969) that could giopardize its charitable purpose that					
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If the foundation agreed to make a grant to or to employ the official for a period after terrimitation of government service, if terrimitating within 90 days.)  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)?  N/A  Organizations relying on a current notice regarding disaster assistance check here  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?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)):  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 Islated 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.)  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  Image: A compart of the foundation hald more than a 2% direct or indirect interest in any business enterprise at any time during the year?  If Yes, "Ist the years 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 grift 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)  In the foundation invest during the year an		· · · · · · · · · · · · · · · · · · ·			
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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  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?  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(i)(3) or 4942(i)(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 \					
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 2012?  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 \	b			ļ	
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?  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(i)(3) or 4942(i)(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 \[ \]  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.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  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)  N/A  4a Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that		section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		
before the first day of the tax year beginning in 2012?  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)):  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		Organizations relying on a current notice regarding disaster assistance check here			
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 \[ \subseteq \] Yes \[ \mathbb{X} \] No  If "Yes," list the year's listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)  N/A  2b  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here    \subseteq \]  3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?    \subseteq \]  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)  N/A  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose?  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	C				
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 \( \) / Yes \( \) No  If 'Yes,' list the years \( \) / A re there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)  N/A  2b  2c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		, , ,	1c		_X_
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 \	2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			
before 2012?  If "Yes," list the years		W. 7			
b Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here	а				
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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.)  c. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		If "Yes," list the years $\blacktriangleright$ ,,,,			
statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	t	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect		}	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach			
Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?    Yes   X   No		statement - see instructions.) N/A	2b		
during the year?    Yes   X   No	C	: If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here			
during the year?    Yes   X   No		<b>&gt;</b>		]	}
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)  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	3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	}		
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)  N/A  Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that					
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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)  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that		• • • • • • • • • • • • • • • • • • • •			
Form 4720, to determine if the foundation had excess business holdings in 2012)  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			-		
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       Image: Control of the purpose			3b		
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	4a				X
			46		х

4b X Form **990-PF** (2012)

Form 990-PF (2012) BRUCKNER FAMILY FOUNDATI		Pomirod ( )	<u>75-16866</u>	88 Page <b>6</b>
Part VII-B   Statements Regarding Activities for Which I	-orm 4720 May be F	required (contin	ued)	
5a During the year did the foundation pay or incur any amount to:			( <del></del> )	ļ
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	, .,	· · · · · · · · · · · · · · · · · · ·	s X No	
(2) Influence the outcome of any specific public election (see section 4955), o	ir to carry on, directly or indire		s X No	
any voter registration drive?	0		S X No	} }
(3) Provide a grant to an individual for travel, study, or other similar purposes		Y6	S LAJ NO	
(4) Provide a grant to an organization other than a charitable, etc., organizatio	n described in section		s X No	
509(a)(1), (2), or (3), or section 4940(d)(2)?			IS LALINO	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or t		s X No	
the prevention of cruelty to children or animals?	d	' <del></del>	S LAL NO	1
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und		in Regulations	N7 / N	r.
section 53.4945 or in a current notice regarding disaster assistance (see instru			N/A	5b
Organizations relying on a current notice regarding disaster assistance check h				}
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption for			. —	
expenditure responsibility for the grant?		I/A	s L No	
If "Yes," attach the statement required by Regulations section 53 4948				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on		s X No	
a personal benefit contract?		Y6		c.   Y
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?		-	6b X
If "Yes" to 6b, file Form 8870	haltas tannas at an O	[	es X No	<u> </u>
7a At any time during the tax year, was the foundation a party to a prohibited tax s		Y6	. —	7.
b If "Yes," did the foundation receive any proceeds or have any net income attribution. Information About Officers, Directors, Trust		pagare Highly		7b
Part VIII Paid Employees, and Contractors	ees, roundation wa	magers, migni	,	
List all officers, directors, trustees, foundation managers and their	compensation.		<del></del>	· · · · · · · · · · · · · · · · · · ·
, , , , , , , , , , , , , , , , , , , ,		(c) Compensation	(d) Contributions to	(e) Expense
(a) Name and address	(b) Title, and average hours per week devoted to position	(If not paid,	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PEGGY BRUCKNER	SECRETARY/TRE	enter -0-)	compensation	anowances
22 EDGEWATER	DECKETARI/INE	MOOKEK		
AMARILLO, TX 79106	0.00	0.	0.	0.
AMARIEDO, IX 75100		- 0.		0.
	1			
	1			
	-			
		<del>                                     </del>		
	1			
2 Compensation of five highest-paid employees (other than those inc	cluded on line 1). If none,	enter "NONE."	<del></del>	<del>l</del>
	(b) Title, and average		(d) Contributions to employee benefit plans	(e) Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation	account, other allowances
NONE	datated to position		compensation	
	-			ļ
	1			
		<b> </b>		
	1			
	<del></del>		-	
	†			
	<del> </del>			
	1			
Total number of other employees paid over \$50,000	<del></del>	<u>.                                    </u>	<b></b>	0

Form 990-PF (2012) BRUCKNER FAMILY FOUNDATION, INC.		<u> 1686688</u>	Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	Managers, Highly		
3 Five highest-paid independent contractors for professional services. If none, enter "NO	NE."		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) C	ompensation
NONE			
Total number of others receiving over \$50,000 for professional services		<b>•</b>	0
Part IX-A Summary of Direct Charitable Activities		<del>r — —                                   </del>	
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical in number of organizations and other beneficiaries served, conferences convened, research papers produced,	formation such as the etc.	Expen	ses
1 <u>N/A</u>		1	
			0.
2			
			<del></del>
3			
4			
Part IX-B Summary of Program-Related Investments  Describe the two largest program-related investments made by the foundation during the tax year on lines 1	and 2	Amou	
1	und Z.	Ailloc	
2			
		-	
All other program-related investments. See instructions.  3 N/A			
		-	0.
Total Add lines 1 through 2			0

Form **990-PF** (2012)

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,652,161.
b		1b	259,075.
C	Fair market value of all other assets	10	
d	Total (add lines 1a, b, and c)	1d	1,911,236.
е	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	
3	Subtract line 2 from line 1d	3	1,911,236.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	28,669.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,882,567.
6	Minimum investment return. Enter 5% of line 5	6	94,128.
P	Part XI  Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here  and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	94,128.
2a	000		
b	Income tax for 2012. (This does not include the tax from Part VI.)	1	
C		2c	<u>890.</u>
3	Distributable amount before adjustments Subtract line 2c from line 1	3	93,238.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	93,238.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	93,238.
P	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	79,360.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the.		
a	Suitability test (prior IRS approval required)	3a	- <del></del>
b	Cash distribution test (attach the required schedule)	3b	<u> </u>
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	79,360.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	79,360.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	qualifies fo	or the section

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	( <b>d)</b> 2012
1 Distributable amount for 2012 from Part XI,		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
line 7				93,238.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years:				
, ,		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007				
<b>b</b> From 2008 351,024.			n .	n
c From 2009 31,778.				
d From 2010 49,587.				
e From 2011 69,710.				
f Total of lines 3a through e	502,099.	· · · · · · · · · · · · · · · · · · ·	<u></u>	
4 Qualifying distributions for 2012 from				
Part XII, line 4. ► \$ 79,360.				
a Applied to 2011, but not more than line 2a			0.	
<b>b</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				79,360.
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))	13,878.			13,878.
6 Enter the net total of each column as indicated below:				
& Corpus Add lines 3f, 4c, and 4e Subtract line 5	488,221.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.	,	
c Enter the amount of prior years'		<del></del>		
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 instr.			0.	
f Undistributed income for 2012. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2013				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2013				
Subtract lines 7 and 8 from line 6a	488,221.			
10 Analysis of line 9:				
a Excess from 2008 337, 146.				
<b>b</b> Excess from 2009 31,778.				
c Excess from 2010 49,587.				
d Excess from 2011 69,710.				
e Excess from 2012			<u> </u>	

Part XIV Private Operating Fo	R FAMILY FO		NC •		.686688 Page 10
<del></del>	<del></del>		-A, question 9)	N/A	
1 a If the foundation has received a ruling or					
foundation, and the ruling is effective for				4040(1)(0)	40.40(.)(5)
<b>b</b> Check box to indicate whether the found		ig toundation described i	Prior 3 years	4942(J)(3) or	4942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year (a) 2012	<b>(b)</b> 2011	(c) 2010	(d) 2009	(e) Total
income from Part I or the minimum	(4) 2012	(0) 2011	(6) 2010	(4) 2003	(0) 10(0)
Investment return from Part X for					
each year listed		<del></del>			
<b>b</b> 85% of line 2a					
c Qualifying distributions from Part XII,					
line 4 for each year listed			<del></del>		
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities			<del></del>	<del></del>	<del></del>
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>b</b> "Endowment" alternative test - enter					<del></del>
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		to this new early	if the foundation	- b-d &E 000	i
Part XV Supplementary Info at any time during t			ii the foundatio	n nad \$5,000 or i	more in assets
1 Information Regarding Foundatio	<del>-</del> -			<del></del>	
a List any managers of the foundation wh		than 2% of the total cont	ributions received by th	na foundation hafora tha	close of any tay
year (but only if they have contributed in	nore than \$5.000). (See s	ection 507(d)(2).)	indutions received by ti	ie iouliuation before the	close of ally lax
PEGGY BRUCKNER	,,,,	· // //			
b List any managers of the foundation wh	n own 10% or more of th	e stock of a cornoration	(or an equally large por	tion of the ownership of	a partnership or
other entity) of which the foundation has			(or an equally large per	non or the ownership or	a partition of the
NONE					
2 Information Regarding Contributi	ion Grant Gift Loan	Scholarship etc. Di	ourame.	<del></del>	
Check here <b>X</b> if the foundation o		·	•	not accept upsolicited r	equests for funds. If
the foundation makes gifts, grants, etc					
a The name, address, and telephone num	<del></del>				
a The hame, address, and telephone ham	ber or a mail or the perse	in to whom applications	silodia be addi essed.		
b The form in which applications should b	e submitted and informa	tion and materials they s	hould include:		
c Any submission deadlines:					
			lundo of activities		
d Any restrictions or limitations on awards	s, such as by geographic	ai areas, charitable fields,	kinas of institutions, o	r other factors;	
223801 12-05-12					Form <b>990-PF</b> (2012)

Part XVI-A

BRUCKNER FAMILY FOUNDATION, INC.

**Analysis of Income-Producing Activities** 

Enter gross amounts unless otherwise indicated.	Unrelated	business income		section 512, 513, or 514	(e)		
•	(a) Business	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income		
1 Program service revenue:	code		code				
a	_						
b	_						
C	_						
d	_						
e							
<b>f</b> .							
g Fees and contracts from government agencies							
2 Membership dues and assessments					<del></del>		
3 Interest on savings and temporary cash		-			<del></del> -		
investments			14	10.154.			
4 Dividends and interest from securities		<del></del>	14	10,154. 34,560.	<del></del>		
5 Net rental income or (loss) from real estate:	<del></del>			34,300.	<del></del>		
	<del>                                     </del>		<del></del>	<del></del>			
a Debt-financed property			<del></del>				
<b>b</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	1						
than inventory			18	2,351.			
9 Net income or (loss) from special events	1		_				
10 Gross profit or (loss) from sales of inventory							
11 Other revenue:							
a	1 1		1 1				
b							
	1						
			<del>-   -  </del>		<del></del>		
0							
12 Subtotal Add columns (b) (d) and (a)			).	47,065.	0.		
12 Subtotal. Add columns (b), (d), and (e)	<u> </u>			13			
13 Total Add line 12, columns (b), (d), and (e)				13	47,005.		
(See worksheet in line 13 instructions to verify calculations.)			<del></del>				
Part XVI-B Relationship of Activities	to the Acco	mplishment of	Exempt Po	ırposes			
Line No. Explain below how each activity for which in		a column (a) of Port VI		umpertantly to the second	nlichment of		
				importantly to the accom	plistiment of		
<u>-</u>	an by providing fur	us ioi such purposes).					
N/A							
					<del> </del>		
		····		· · · · · · · · · · · · · · · · · · ·			
···				<del></del>			
		<del></del>					
				<del></del>			
					·		

Form 990-PF (2012) BRUCKNER FAMILY FOUNDATION, INC. 75-168668  Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitation										
	• Exempt Organizations									
1	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?									
	The state of the s			1						

1	Did the	organization directly or indire	ectly engage in any o	of the followin	ig with ai	ny other organization	on described in sect	ion 501(c) of		Yes	No
	the Cod	le (other than section 501(c)	(3) organizations) or	n section 52	7, relatir	ng to political organ	izations?				
a	Transfe	rs from the reporting founda	ition to a noncharitat	ole exempt org	ganızatıo	n of.					
	(1) Cas	sh							1a(1)		_ <u>X</u> _
	(2) Oth	ner assets							1a(2)		X
þ	Other tr	ansactions:									
	` '	les of assets to a noncharitat	• =						1b(1)		<u>X</u>
	` '	rchases of assets from a nor		rganization					1b(2)	<u> </u>	X
	` '	ntal of facilities, equipment, o	or other assets						1b(3)		<u>X</u>
	· ·	imbursement arrangements							1b(4)		X
	<b>1</b> - <b>7</b>	ans or loan guarantees							1b(5)		X
	` '	rformance of services or mer		-					1b(6)		X
	_	of facilities, equipment, mai	-		-				1c	<u> </u>	X
d		nswer to any of the above is '								sets,	
		ces given by the reporting fo			ed less ti	nan fair market vali	ie in any transaction	or sharing arrangement	t, show in		
		(d) the value of the goods, o					1.0				
a)L	ine no	(b) Amount involved	(c) Name of	noncharitable	exempt	organization	(0) Description	of transfers, transactions, ar	nd sharing ar	rangeme	nts
				N/A							
				-			<u> </u>				
	-										
								<del> </del>			
			<u> </u>				-	<del></del> .			
							-				
			<u>.                                    </u>			<del>.</del>					
									· · ·		
				<del></del>							
								· · · · · · · · · · · · · · · · · · ·			
2.	le the fe		the affiliated with or r	alated to one	or more	tay ayamat araan	vations described				
2 a		on 501(c) of the Code (other	•	-			izations described		Yes	¥	No
<b>h</b>		complete the following sche		(3)) 01 111 3001	1011 527				103		_ 140
	11 100,	(a) Name of orga			(b) Tvi	oe of organization	T	(c) Description of relatio	nship		
		N/A			(-, -,			(-)			
		41/42			<u> </u>						
						· · · · · · · · · · · · · · · · · · ·					-
		<del></del>									
					†						
		der penalties of perjury, I declare t							May the IRS	discuss t	hie
Sig	gn   👢	d belief, it is true, correct, and corr	plete Declaration of pre	eparer (other than	n taxpayei	n) is based on all inform	nation of which prepare	r has any knowledge	eturn with the	e prepar	er
He	re	Leggy D	rue Fre	<b>ت</b>		<i>251919D</i>	Dec.	near	X Yes		No
	S	ignature of officer of trustee			D	ate	Title	L			
		Print/Type preparer's na	me	Preparer's s	ignature		Date	Check If PTII	N		
								self- employed			
Pa	id	JULE MINIU	М	JULE M	INI	ЛМ	05/07/13	P	00194	716	
Pr	epare			M & CO				Firm's EIN ▶ 75-			
	e Onl			- <del>-</del>						•	
		Firm's address ▶ PO	BOX 2021	0							
	AMARILLO, TX 79114-2210							Phone no. 806	<u> -355-</u>	824	1

Part IV Capital Gains and Losses for Tax on Investment Income (b) How acquired (c) Date acquired (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold P - Purchase D - Donation 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo, day, yr.) (mo, day, yr.) 07/26/1208/03/12 P 1a ELEMENTS ROGERS TRUST P 07/26/1208/03/12 b MSCI EAFE P 07/26/1208/03/12 c MSCI EMERGING MARKETS P |07/26/12|09/06/12 d BARCLAYS AGREGATE BOND FUND P 08/03/1209/06/12 e BARCLAYS 3-7 YEAR TREASURY BOND FUND 07/26/1210/03/12 P f FINANCIALS ALPHADEX 07/26/1210/03/12 P g SPDR FUND - TECHNOLOGY h BARCLAYS AGREGATE BOND FUND P 07/26/1210/04/12 BARCLAYS AGREGATE BOND FUND P 08/03/1210/04/12 J ELEMENTS ROGERS TRUST 09/06/12|11/06/12 P P 07/26/1212/06/12 k DJ US REAL ESTATE P 12/31/1212/31/12 I AMORTIZATION OF BOND PREMIUM m BARCLAYS AGREGATE BOND FUND P 07/26/1209/07/12 n CAPITAL GAINS DIVIDENDS 0 (g) Cost or other basis (h) Gain or (loss) (f) Depreciation allowed (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 3,668. 3,706 -38. а 619. 15,481. 14,862. b 11,603. 11,133 470. C ~48. 14,745 14,697. đ 26,111 26,085. -26. е 536. 7,971. 7,435. f 8,090. 7,435 655. g 6,842. -24. 6,866. h -19. 4,598. 4,617 3,246. 3,246. 0. 3,445. 3,463 -18. k 738 -738. ١ 19,033. 19,135 -102. m 1,084. 1,084. n 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col (h)) Gains (excess of col (h) gain over col (k), (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any -38. а 619. b 470. C d -48. -26. е 536. 655. g -24. h -19. 0. -18. k -738. -102. m 1,084. n 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } Capital gain net income or (net capital loss) 2,351. Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 N/A

#### Schedule B

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

Department of the Treasury Internal Revenue Service

Name of the organization

#### **Schedule of Contributors**

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

OMB No 1545-0047

2012

**Employer identification number** 

75-1686688 BRUCKNER FAMILY FOUNDATION, INC. Organization type (check one) Filers of: Section: 501(c)( Form 990 or 990-EZ ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF X 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

Employer identification number

## BRUCKNER FAMILY FOUNDATION, INC.

75-1686688

Part I	Contributors (see instructions) Use duplicate copies of Part I	ıf addıtıonal space ıs needed	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BRUCKNER TRUCK SALES, INC.  8351 AMARILLO BLVD. EAST  AMARILLO, TX 79107	\$\$	Person X Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)

Employer identification number

## BRUCKNER FAMILY FOUNDATION, INC.

75-1686688

Part II	Noncash Property (see instructions) Use duplicate copies of Pa	art 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
		\$	
(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
		   \$	

Employer identification number

BRUCKN	ER FAMILY FOUNDATION, I	NC	75-1686688		
Part III	Exclusively religious, charitable, etc., individually year Complete columns (a) through (e) and the the total of exclusively religious, charitable, etc., Use duplicate copies of Part III if additional	lual contributions to section 501(c) following line entry. For organizatio contributions of \$1,000 or less for	(7), (8), or (10) organizations that total more than \$1,000 for the ns completing Part III, enter the year (Enter this information once) \$		
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held		
	Transferee's name, address, and	(e) Transfer of gift	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		
	Transferee's name, address, and	(e) Transfer of gift	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		
	Transferee's name, address, and	(e) Transfer of gif	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		Relationship of transferor to transferee		

# BRUCKNER FAMILY FOUNDATION ATTACHMENT TO 990-PF 2012 CONTRIBUTIONS 75-1686688

NAME	ADDRESS	PURPOSE	AMOUNT
Amarillo Area Foundation	700 First National Place One, 801 S. Fillmore Amarillo, TX 79180	Educational	1,200.00
Amarillo Botanıcal Gardens	1400 Streit Drive Amarillo, TX 79106	Educational	640.00
Amarillo Museum of Art (Christmas Roundup)	2200 S. Van Buren Amarıllo, TX 79109	Public Charity	1,000.00
Amarillo Opera	2223 S. Van Buren St. Amarıllo, TX 79109	Public Charity	500.00
Amarillo Symphony	1000 S. Polk Amarillo, TX 79101	Public Charity	2,500.00
American Business Club Inc	P.O. Box 64213 Lubbock, TX 79464-4213	Public Charity	70.00
Asbury Theological Seminary	204 N. Lexington Avenue Wilmore, KY 40390-1199	Religious	1,000.00
Bent Tree Baptist	4141 International Pkwy Carrollton, TX 75007	Religious	45.00
BSA Foundation	1600 Wallace Boulevard Amarıllo, TX 79106	Public Charity	100.00
Citychurch	205 S. Polk Amarillo, TX 79101	Religious	500.00
Don & Sybil Harrington Cancer Center	1500 Wallace Blvd. Amarillo, TX 79106	Public Charity	900.00
Don Harrington Discovery Center	1200 Streit Dr. Amarillo, TX 79106	Public Charity	250.00

Downtown Women's Center	409 S. Monroe Amarillo, TX 79101	Public Charity	1,000.00
Faith City Ministries	401 S.E. 2nd Street Amarillo, TX 79101	Public Charity	500.00
Fellowship of Christian Athletes	8701 Leeds Rd. Kansas City, MO 64129	Religious	1,250.00
Gideons International	P.O. Box 2304 Amarillo, TX 79105	Religious	3,000.00
Golden Spread Boy Scout Council	401 Tascosa Road Amarıllo, TX 79124	Public Charity	100.00
Heritage Foundation	214 Massachusetts Ave. NE Washington DC 20002-4999	Public Charity	500.00
High Plains Food Bank	815 Ross Street Amarillo, TX 79102	Public Charity	50.00
Junior Achievement	One Education Way Colorado Springs, CO 80906	Public Charity	100.00
Maverick Boys & Gırls Club	1923 S. Lincoln St. Amarıllo, TX 79109	Public Charity	100.00
McMurray University	McMurray Station Abilene, TX 79697	Educational	1,000.00
Panhandle Plains Historical Museum	2503 4th Avenue Canyon, TX 79015	Public Charity	100.00
Polk Street United Methodist Church	1401 S. Polk Amarillo, TX 79101	Religious	52,900.00
River Road High School Choir	101 Mobley St. Amarillo, TX 79108	Public Charity	300.00
Salvation Army	500 S. Harrison Amarillo, TX 79101	Public Charity	100.00

Samaritan Pastoral Counseling Center of Amarillo	112 W. 8th St., Suite 800 Amarillo, TX 79101	Public Charity	500.00
South Union Baptist Church	1707 E. Kentucky Street Midland, TX 79701	Religious	100.00
Tascosa Band and Orchestra	3921 Westlawn Avenue Amarillo, TX 79102	Educational	530.00
Tascosa Excellence Council	3921 Westlawn Avenue Amarillo, TX 79102	Educational	1,000.00
Tascosa High School Booster Club	3921 Westlawn St. Amarillo, TX 79102	Educational	1,000.00
Texas Boys Ranch	P.O. Box 5665 Lubbock, TX 79408	Educational	1,000.00
Texas Tech Foundation	P.O. Box 45025 Lubbock, TX 79409	Educational	250.00
The Navigators	2418 W. 9th Amarillo, TX 79106	Educational	3,200.00
Wesley Community Center	1615 S. Roberts Amarillo, TX 79102	Educational	1,000.00
Westminster Presbyterian Chruch	2525 Wimberly Rd. Amarillo, TX 79109	Religious	100.00

Total 2012 Contributions

78,385.00

FORM 990-PF INTEREST ON SAVI	NGS A	ND TEM	PORARY CA	ASH IN	VESTMENTS	STATEMENT	1
SOURCE						AMOUNT	
MERRILL LYNCH						10,1	54.
TOTAL TO FORM 990-PF, PART I,	LINE	3, CO	LUMN A			10,1	54.
FORM 990-PF DIVIDEND	S AND	INTER	EST FROM	SECUR	ITIES	STATEMENT	2
SOURCE		GROSS	TNUOMA		TAL GAINS	COLUMN (A AMOUNT	)
MERRILL LYNCH VANGUARD	-		17,312. 18,332.		272. 812.	17,0 17,5	
TOTAL TO FM 990-PF, PART I, L	N 4		35,644.		1,084.	34,5	60.
FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN		(C) ADJUSTED NET INCOM		
ACCOUNTING FEES		1,950.		975.		9	75.
TO FORM 990-PF, PG 1, LN 16B		1,950.		975.		9	75.
FORM 990-PF		TAX	ES			STATEMENT	4
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN		(C) ADJUSTEL NET INCOM		
EXCISE TAX ON INVESTMENT INCOME FOREIGN INVESTMENT TAXES		890. 250.		0. 250.			0.
TO FORM 990-PF, PG 1, LN 18	<del></del>	1,140.		250.			0.

FORM 990-PF	OTHER E	XPENSES		STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME			
ML ANNUAL ACCOUNT FEE	1,321.	1,32	1.		0.
TO FORM 990-PF, PG 1, LN 23	1,321.	1,32	1.		Ο.
FORM 990-PF	CORPORAT	E STOCK		STATEMENT	(
DESCRIPTION		1	BOOK VALUE	FAIR MARKE' VALUE	т
AMERICAN CAPITAL WORLD GROWT: AMERICAN GROWTH FUND OF AMER VANGUARD 500 INDEX FUND AMERICAN CAPITAL INCOME BUIL: AMERICAN INCOME FUND OF AMER AMERICAN INVESTMENT COMPANY AMERICAN NEW PERSPECTIVE FUN VANGUARD TOTAL BOND MARKET INTERICAN NEW WORLD FUND AMERICAN BOND FUND OF AMERICA AMERICAN BOND FUND OF AMERICA AMERICAN FUND GLOBAL BALANCE ELEMENTS ROGERS TRUST FIRST TR HEALTH CARE ISHARES CORE TOTAL US ISHARES DOW JONES US ISHARES MSCI EAFE INDEX ISHARES RUSSELL 1000 SECTOR SPDR CONSMRS STPL	ICA DER FUND ICA OF AMERICA D NDEX ADM		44,707. 9,732. 531,541. 84,315. 114,669. 17,209. 21,756. 135,814. 2,675. 59,653. 62,810. 7,643. 7,816. 3,132. 3,912. 7,274. 22,430. 22,289. 7,806. 7,430.	58,6; 13,7; 656,4; 98,9; 130,6; 19,4; 29,9; 137,8; 70,9; 65,8; 7,3; 7,7; 3,1; 3,9; 7,4; 24,7; 23,3; 7,6; 8,5;	119 119 167 149 334 339 150 456 148 108

FORM 990-PF CORPORATE BOND	S	STATEMENT 7
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MORGANSTANLEY BOND	50,436.	51,774.
CITIGROUP BOND	29,945.	31,893.
GOLDMAN SACHS GROUP INC	49,450.	52,770.
ROYAL BK OF SCOTLAND PLC	49,630.	53,092.
LLOYDS TSB BANK PLC	51,336.	55,145.
TOTAL TO FORM 990-PF, PART II, LINE 10C	230,797.	244,674.