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Form

990-PF

Department of the Treasury  
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation The Sarah and Ross Perot Jr Foundation		<b>A Employer identification number</b>  43-1964344	
Number and street (or P O box number if mail is not delivered to street address) PO Box 269014		<b>B Telephone number</b> (see instructions)  (972) 535-1900	
City or town, state or province, country, and ZIP or foreign postal code Plano, TX 75026		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 12,616,202		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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 (attach schedule)	1,760,840			
	2 Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments	18	18		
	4 Dividends and interest from securities. . . . .	256,769	256,769		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	161,747			
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV, line 2) . . .		161,747		
	8 Net short-term capital gain . . . . .				
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold . . . . .				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .	18,959	377		
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	2,198,333	418,911		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .				
	c Other professional fees (attach schedule) . . . . .				
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	15,449	449		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .	7,618	0		7,618
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	91,587	61,763		29,824
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	114,654	62,212		37,442
	25 Contributions, gifts, grants paid . . . . .	4,024,848			4,024,848
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	4,139,502	62,212		4,062,290
	27 Subtract line 26 from line 12				
a <b>Excess of revenue over expenses and disbursements</b>		-1,941,169			
b <b>Net investment income</b> (if negative, enter -0-)			356,699		
c <b>Adjusted net income</b> (if negative, enter -0-)					

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 . . . . .	259,223	217,794	217,794
	2	Savings and temporary cash investments . . . . .			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .			
	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) . . . . .	13,717,660	11,817,920	12,393,158
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)	5,250	5,250	5,250
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	13,982,133	12,040,964	12,616,202
	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22) . . . . .	0	0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds . . . . .	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	13,982,133	12,040,964	
	30	Total net assets or fund balances (see page 17 of the instructions) . . . . .	13,982,133	12,040,964	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	13,982,133	12,040,964	

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	13,982,133
2	Enter amount from Part I, line 27a . . . . .	2	-1,941,169
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3 . . . . .	4	12,040,964
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	12,040,964

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co )		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr )	(d) Date sold (mo , day, yr )
1a	See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	161,747
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)  If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 . . . . .		3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income )

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	4,280,428	15,668,758	0 273182
2011	3,421,956	17,702,905	0 193299
2010	7,446,365	21,508,894	0 346199
2009	2,704,884	10,096,646	0 267899
2008	1,319,637	1,932,491	0 682868

2	Total of line 1, column (d). . . . .	2	1 763447
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 352689
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . . .	4	13,419,614
5	Multiply line 4 by line 3. . . . .	5	4,732,950
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	3,567
7	Add lines 5 and 6. . . . .	7	4,736,517
8	Enter qualifying distributions from Part XII, line 4. . . . .  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	8	4,062,290

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)					
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	7,134		
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 <input type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		2	0		
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)					
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)				3	7,134
3 Add lines 1 and 2. . . . .				4	0
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	7,134		
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		6a	11,966		
6 Credits/Payments					
a 2013 estimated tax payments and 2012 overpayment credited to 2013					
b Exempt foreign organizations—tax withheld at source . . . . .					
c Tax paid with application for extension of time to file (Form 8868)					
d Backup withholding erroneously withheld . . . . .		6b			
		6c			
		6d			
7 Total credits and payments Add lines 6a through 6d. . . . .		7	11,966		
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" 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			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. . . . .		10	4,832		
11 Enter the amount of line 10 to be Credited to 2014 estimated tax  4,832 Refunded		11	0		

Part VII-A Statements Regarding Activities				
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . . <i>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.</i>			No
		1b		No
c	Did the foundation file Form 1120-POL for this year?. . . . .	1c		No
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? . . . . . <i>If "Yes," attach a detailed description of the activities.</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?. . . . .	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	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? <i>If "No," attach explanation .</i>	8b	Yes	
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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i> . . . . .	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of JY Robb III Telephone no (972) 535-1930 Located at 2300 W Plano Parkway Plano TX ZIP+4 75075			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.			
		15		
16	At any time during calendar year 2013, 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	Yes	No
	See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country			

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?			
	(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 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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 2013?	1c		No
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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions ).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
b	If "Yes," did it have excess business holdings in 2013 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 2013.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2013?	4b		No

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))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		No
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?			
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?			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
If "Yes" to 6b, file Form 8870.				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Henry Ross Perot Jr	Trustee, Vice	0	0	0
PO Box 269014 Plano, TX 75026	President/Tr 0 00			
Sarah F Perot	Trustee, President/Sec	0	0	0
PO Box 269014 Plano, TX 75026	20 00			
Darcy Glen Anderson	Trustee	0	0	0
PO Box 269014 Plano, TX 75026	0 00			
J Y Robb III	Trustee, Asst	0	0	0
PO Box 269014 Plano, TX 75026	Secretary 0 00			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. . . . .		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 The Foundation makes grants to other organizations to assist them in conducting their direct charitable activities	0
2 The Foundation provides assistance to unrelated individuals who are eligible recipients	0
3 The Foundation provides assistance to other indigent individuals	0
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3 . . . . .	0



Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	13,614,520
b	Average of monthly cash balances. . . . .	1b	4,204
c	Fair market value of all other assets (see instructions). . . . .	1c	5,250
d	Total (add lines 1a, b, and c). . . . .	1d	13,623,974
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	0
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	0
3	Subtract line 2 from line 1d. . . . .	3	13,623,974
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	204,360
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	13,419,614
6	Minimum investment return. Enter 5% of line 5. . . . .	6	670,981

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	670,981
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	7,134
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	7,134
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	663,847
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	663,847
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	663,847

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	4,062,290
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	
b	Cash distribution test (attach the required schedule). . . . .	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	4,062,290
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	4,062,290
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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				663,847
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only. . . . .			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008. . . . .	1,223,028			
b From 2009. . . . .	2,201,800			
c From 2010. . . . .	6,378,248			
d From 2011. . . . .	2,541,279			
e From 2012. . . . .	3,504,637			
f Total of lines 3a through e. . . . .	15,848,992			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 4,062,290				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
c Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
d Applied to 2013 distributable amount. . . . .				663,847
e Remaining amount distributed out of corpus	3,398,443			
5 Excess distributions carryover applied to 2013 (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	19,247,435			
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 2012 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .	1,223,028			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	18,024,407			
10 Analysis of line 9				
a Excess from 2009. . . .	2,201,800			
b Excess from 2010. . . .	6,378,248			
c Excess from 2011. . . .	2,541,279			
d Excess from 2012. . . .	3,504,637			
e Excess from 2013. . . .	3,398,443			

Part XIV

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling. . . . .

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
b	85% of line 2a . . . . .					
c	Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
d	Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets . . . . .					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

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

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )

See Additional Data Table

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

Kristen Garcia  
5500 Preston Road Suite 365  
Dallas, TX 75205  
(214) 528-2225

b

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

Please contact the named person above for details

c

Any submission deadlines

Please contact the named person above for details

d

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

Please contact the named person above for details

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			3a	4,024,848
b Approved for future payment				
Total . . . . .			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

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

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1

Cash.

1a(1)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

d

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

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

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes

☒ No

b

If "Yes," complete the following schedule.

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

Sign Here

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

\*\*\*\*\*

2014-10-29

\*\*\*\*\*

Signature of officer or trustee

Date

Title

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

☒ Yes

☐ No

Paid Preparer Use Only

Print/Type preparer's name Jason W Mann	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN P01343590	
Firm's name	Petrus Trust Company LTA			Firm's EIN	80-0168836
Firm's address	PO Box 269014 Plano, TX 75026			Phone no	(972) 535-1900

Form 990-PF (2013)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co )	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr )	(d) Date sold (mo , day, yr )
Petrus Short Term Fund LP	P		
Petrus Short Term Fund LP	P		
Petrus Dividend Basket LP	P		
Petrus Dividend Basket LP	P		
Petrus Yield Opportunity Fund LP	P		
Petrus Yield Opportunity Fund LP	P		
Petrus Q uantitative Strategy Fund LP	P		
Petrus Q uantitative Strategy Fund LP	P		
Petrus Special Situations Fund LP	P		
Petrus Special Situations Fund LP	P		
Petrus Securities LP	P		
Petrus Securities LP	P		
Petrus Tactical Fund LP	P		
Petrus Tactical Fund LP	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
			417
			299
			6,012
			34,564
			2,837
			29,776
			-5,441
			-15,152
			46,003
			15,911
			26,054
			26,993
			199
			-6,725




Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			417
			299
			6,012
			34,564
			2,837
			29,776
			-5,441
			-15,152
			46,003
			15,911
			26,054
			26,993
			199
			-6,725


**Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).**

Henry Ross Perot Jr
Sarah F Perot


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
The Air Force Association 1501 Lee Highway Arlington, VA 22209	None	Public Charity	Promote public understanding of the Aerospace Industry to the public	200
AOPA Foundation 421 Aviation Way Frederick, MD 21701	None	Public Charity	Educate the public on the value of general aviation	10,000
AT&T Performing Arts Center 2100 Ross Ave Suite 650 Dallas, TX 75201	None	Public Charity	Support for the Performing Arts	25,000
AT&T Performing Arts Center 2100 Ross Ave Suite 650 Dallas, TX 75201	None	Public Charity	Support for the Performing Arts	333,334
Bright Hope Baptist Church 1601 N 12th Street Philadelphia, PA 19122	None	Public Charity	Religious Support	1,000
Camp John Marc 2824 Swiss Avenue Dallas, TX 75204	None	Public Charity	Provide specialized camp experiences for children with chronic medical challenges	5,000
Crystal Charity Ball 30 Highland Park Village Suite 206 Dallas, NY 75205	None	Public Charity	Humanitarian	25,000
Crystal Charity Ball 30 Highland Park Village Suite 206 Dallas, TX 75205	None	Public Charity	Humanitarian	1,000
Dallas Arboretum 8525 Garland Road Dallas, TX 75218	None	Public Charity	Promote knowledge of horticulture	5,000
Dallas Architecture Forum PO Box 596119 Dallas, TX 75359	None	Public Charity	Provide public discourse on architecture and urban design in Dallas	1,000
Dallas Museum of Art 1717 North Harwood Dallas, TX 75201	None	Public Charity	Support for Museum Art programs	2,000
Dallas Symphony Orchestra 2301 Flora Street Dallas, TX 75201	None	Public Charity	Support for the Performing Arts	10,000
Dallas Symphony Orchestra 2301 Flora Street Dallas, TX 75201	None	Public Charity	Support for the Performing Arts	100,000
Dallas Zoological Society 650 SRL Thornton Freeway Dallas, TX 75203	None	Public Charity	Support for the Center of Education & Wildlife Conservation	2,500
Episcopal School of Dallas 4100 Merrell Road Dallas, TX 75229	None	Public Charity	Educational support	100,000
<b>Total . . . . .</b>  <b>3a</b>				4,024,848


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
Gilliland Baptist Church 12561 Private Road 3602 Crowell, TX 79227	None	Public Charity	Religious Support	250
Highland Park Presbyterian Church 3821 University Blvd Dallas, TX 75205	None	Public Charity	Religious Support	500
Highland Park Presbyterian Church 3821 University Blvd Dallas, TX 75205	None	Public Charity	Religious Support	12,500
Highland Park Presbyterian Church 3821 University Blvd Dallas, TX 75205	None	Public Charity	Religious Support	12,500
Highland Park Presbyterian Church 3821 University Blvd Dallas, TX 75205	None	Public Charity	Religious Support	12,500
Highland Park Presbyterian Church 3821 University Blvd Dallas, TX 75205	None	Public Charity	Religious Support	12,500
Kimbell Art Museum 3333 Camp Bowie Boulevard Fort Worth, TX 76107	None	Public Charity	Support for Museum Art Programs	1,000
Los Angeles County Museum of Art 5905 Wilshire Boulevard Los Angeles, CA 90036	None	Public Charity	Support for Museum Art Programs	25,000
Lee Park and Arlington Hall Conservancy 3625 N Hall Street Suite 690 Dallas, TX 75219	None	Public Charity	Promote the preservation and enhancement of Lee Park	1,000
Library of Congress 101 Independence Avanne Washington, DC 20540	None	Public Charity	James Madison Council 2012 Annual Fund	25,000
Living Water International 4001 Greenbriar Drive Stafford, TX 77477	None	Public Charity	Help communities acquire clean water	10,000
Massachusetts Institute of Technology 77 Massachussets Avenue Cambridge, MA 02139	None	Public Charity	Educational Support	37,000
Mental Health America of Greater Tarrant County 3136 West 4th Street Fort Worth, TX 76107	None	Public Charity	Provide eduation on suicide awareness	500
National Math & Science Initiative 8350 N Central Expressway Suite M-2200 Dallas, TX 75206	None	Public Charity	Promote higher learning in math & science	100,000
National Museum for Women in the Arts 1250 New York Avenue Northwest Washington, DC 20005	None	Public Charity	Recognizes women's creative contributions to the community	1,000
<b>Total</b> . . . . .  <b>3a</b>				4,024,848


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Nexus 8733 La Prada Drive Dallas, TX 75228	None	Public Charity	Provide support to low income women and their families affected by addiction	2,500
Pastoral Counseling and Education Center 4525 Lemmon Ave Suite 200 Dallas, TX 75219	None	Public Charity	Humanitarian	2,500
Perot Museum of Nature and Science 2201 N Field Street Dallas, TX 75201	None	Public Charity	Inspire minds through nature and science	25,000
Project Hope PO Box 250 Millwood, VA 22646	None	Public Charity	Provide lasting solutions to health problems	10,000
Philanthropy Roundtable 1730 M Street NW Suite 601 Washington, DC 20036	None	Public Charity	Provide a network of charity donors to help strengthen our free society	5,000
Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity	Meadows School of the Arts Support	4,000
Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity	Educational Support	400,000
Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity	Educational Support	500,000
Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity	Educational support	500
Southern Methodist University PO Box 750402 Dallas, TX 75275	None	Public Charity	Educational Support	5,000
St Mark's School of Texas 10600 Preston Road Dallas, TX 75230	None	Public Charity	Educational support	25,000
St Mark's School of Texas 10600 Preston Road Dallas, TX 75230	None	Public Charity	Building campaign	1,250,000
Texas State History Museum PO Box 12456 Austin, TX 78711	None	Public Charity	Provide educational resources about the history of Texas	25,000
The Air Force Association 1501 Lee Highway Arlington, VA 22209	None	Public Charity	Promote public understanding of the Aerospace Industry to the public	125,000
The Arts Community Alliance One Arts Plaza 1722 Routh Street Suite 115 Dallas, TX 75201	None	Public Charity	Provide financial support and awareness for the performing arts	2,500
<b>Total . . . . .</b>  <b>3a</b>				4,024,848

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
The Arts Community Alliance One Arts Plaza 1722 Routh Street Suite 115 Dallas, TX 75201	None	Public Charity	Provide financial support and awareness for the performing arts	1,500
The Blair House Restoration Fund Post Office 27208 Washington, DC 20038	None	Public Charity	Provide renovation support to housing used by foreign persons when visiting the U S	35,000
The Community Foundation of Middle Tennessee 3833 Cleghorn Avenue Nashville, TN 37215	None	Public Charity	Providing support to the community	1,000
The Global Fund for Children 1101 14th Street NW Ste 420 Washington, DC 20005	None	Public Charity	Programs to advance the dignity of children around the world	500,000
The National MS Society 8111 N Stadium Drive Suite 100 Houston, TX 77054	None	Public Charity	Educate the public about Multiple Sclerosis	500
The New York Botanical Garden 2900 Southern Boulevard Bronx, NY 10458	None	Public Charity	Educate people about science, ecology and health eating	250
The Salvation Army 8787 N Stemmons Freeway Suite 800 Dallas, TX 75247	None	Public Charity	Programs to meet human needs in the community	100,000
The Sweetheart Ball PO Box 9106 Dallas, TX 75209	None	Public Charity	Medical research	15,000
The United Way of Metropolitan Dallas 1800 North Lamar Street Dallas, TX 75202	None	Public Charity	Provide financial and educational assistance to families in the community	15,000
The University of Texas at Austin Lady Bird Johnson Wildflower Center 4801 La Crosse Avenue Austin, TX 78739	None	Public Charity	Programs for conserving native plants and addressing ecological problems	5,000
The University of Texas at Austin Lady Bird Johnson Wildflower Center 4801 La Crosse Avenue Austin, TX 78739	None	Public Charity	Programs for conserving native plants and addressing ecological problems	1,500
Treasure Street 2222 Welborn Street Dallas, TX 75219	None	Public Charity	Texas Scottish Rite Hospital service to handicapped children	25,000
Ufton Court Educational Trust Ufton Court Green Lane Reading Berkshire RG7 4HD UK	None	Public Charity	Provide innovative and challenging experiences to children	15,464
Universal Health Services PO Box 8795 Fort Worth, TX 76124	None	Public Charity	Provide support to patients and families with terminal illnesses	100
Volunteers for Christ 1824 8th Avenue Fort Worth, TX 76110	None	Public Charity	Provide missionary support to Brazil and Brazilians	1,000
<b>Total . . . . .</b>  <b>3a</b>				4,024,848

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Young Life 11300 N Central Expressway Dallas, TX 75243	None	Public Charity	Education in faith and religion	500
Young Life 11300 N Central Expressway Dallas, TX 75243	None	Public Charity	Education in faith and religion	10,000
Air Warrior Courage Foundation PO Box 877 Silver Spring, MD 20918	None	Public Charity	Provide disables veterans with rehabilitation opportunities	3,500
All Saints Health Foundation 1400 Eighth Avenue Fort Worth, TX 76104	None	Public Charity	Endowment fund for nursing	250
American Film Institute 2201 North Western Avenue Los Angeles, CA 90027	None	Public Charity	Promote eduation in the arts and film industry	40,000
<b>Total</b> . . . . .  <b>3a</b>				4,024,848

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <a href="http://www.irs.gov/form990">www.irs.gov/form990</a>.</div>	<div>OMB No 1545-0047</div> <div>2013</div>

<div>Name of the organization</div> <div>The Sarah and Ross Perot Jr Foundation</div>	<div>Employer identification number</div> <div>43-1964344</div>
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Organization type (check one)

<div>Filers of:</div> <div>Form 990 or 990-EZ</div> <div>Form 990-PF</div>	<div>Section:</div> <div><div><input type="checkbox"/> 501(c)( ) (enter number) organization</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation</div><div><input type="checkbox"/> 527 political organization</div><div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div><div><input type="checkbox"/> 501(c)(3) taxable private foundation</div></div>
--	---

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<sup>1</sup>/<sub>3</sub>% 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 for 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 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 its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).



<b>Name of organization</b> The Sarah and Ross Perot Jr Foundation	<b>Employer identification number</b> 43-1964344
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<b>Part I</b>	<b>Contributors</b> (see instructions) Use duplicate copies of Part I if additional space is needed		
<b>(a)</b> <b>No.</b>	<b>(b)</b> <b>Name, address, and ZIP + 4</b>	<b>(c)</b> <b>Total contributions</b>	<b>(d)</b> <b>Type of contribution</b>
<div>1</div>	<div>Henry Ross Perot Jr</div> <div>PO Box 269014</div> <div>Plano, TX75026</div>	<div>\$</div> <div>1,723,397</div>	<div>Person <input checked="" type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions )</div>
<div>2</div>	<div>SFP Inc</div> <div>PO Box 269014</div> <div>Plano, TX75026</div>	<div>\$</div> <div>10,654</div>	<div>Person <input checked="" type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions )</div>
<div>3</div>	<div>Hillwood Management Ltd</div> <div>3090 Olive Street Suite 200</div> <div>Dallas, TX75219</div>	<div>\$</div> <div>26,788</div>	<div>Person <input checked="" type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions )</div>
<div></div>		<div>\$</div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions )</div>
<div></div>		<div>\$</div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions )</div>
<div></div>		<div>\$</div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions )</div>
<div></div>		<div>\$</div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions )</div>

<b>Name of organization</b> The Sarah and Ross Perot Jr Foundation	<b>Employer identification number</b> 43-1964344
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Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(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
_____	_____ _____ _____ _____	\$ _____	_____

<b>Name of organization</b> The Sarah and Ross Perot Jr Foundation	<b>Employer identification number</b> 43-1964344
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<b>Part III</b>	<b>Exclusively</b> religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of <i>exclusively</i> religious, charitable, etc , contributions of <b>\$1,000 or less</b> for the year (Enter this information once See instructions ) ▶ \$ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div>	<div></div>	<div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
—	<div></div>	<div></div>	
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
—	<div></div>	<div></div>	<div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
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	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
—	<div></div>	<div></div>	<div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	

**TY 2013 Investments - Other Schedule****Name:** The Sarah and Ross Perot Jr Foundation**EIN:** 43-1964344

<b>Category/ Item</b>	<b>Listed at Cost or FMV</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
Investment in Petrus Short Term Fund LP	AT COST	5,866,121	5,848,460
Investment in Petrus Dividend Basket, LP	AT COST	1,544,459	1,828,553
Investment in Petrus Yield Opportunity Fund, LP	AT COST	1,392,864	1,312,638
Investment in Petrus Quantitative Strategies Fund, LP	AT COST	564,299	562,127
Investment in Petrus Special Situations Fund, LP	AT COST	510,016	549,145
Investment in Petrus Securities, LP	AT COST	1,643,558	2,021,064
Investment in Petrus Tactical Fund, LP	AT COST	296,603	271,171

## TY 2013 Other Assets Schedule

**Name:** The Sarah and Ross Perot Jr Foundation

**EIN:** 43-1964344

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Organizational Costs	5,250	5,250	5,250

**TY 2013 Other Expenses Schedule****Name:** The Sarah and Ross Perot Jr Foundation**EIN:** 43-1964344

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Petrus Short Term Fund LP	7,700	7,700		0
Petrus Dividend Basket LP	6,757	6,757		0
Petrus Yield Opportunity Fund LP	5,840	5,840		0
Petrus Quantitative Strategies LP	3,377	3,377		0
Petrus Special Situations Fund LP	2,959	2,959		0
Petrus Securities, LP	10,046	10,046		0
Petrus Tactical Fund LP	25,084	25,084		0
Office Expense	27,338	0		27,338
Insurance Expense	287	0		287
Utilities Expense	2,149	0		2,149
Consulting Expense	50	0		50

**TY 2013 Other Income Schedule****Name:** The Sarah and Ross Perot Jr Foundation**EIN:** 43-1964344

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Tax Exempt Income	18,582	0	18,582
O ther Portfolio Income-Petrus Short Term Fund LP	82	82	82
O ther Portfolio Income-Petrus Yield Opportunity Fund, LP	1,049	1,049	1,049
O ther Portfolio Income-Petrus Quantitative Strategies LP	-23,269	-23,269	-23,269
O ther Portfolio Income-Petrus Special Situations LP	1,787	1,787	1,787
O ther Portfolio Income-Petrus Securities LP	9,094	9,094	9,094
O ther Portfolio Income-Petrus Tactical Fund LP	11,633	11,633	11,633
O ther Portfolio Income-Petrus Dividend Basket LP	1	1	1

**TY 2013 Taxes Schedule****Name:** The Sarah and Ross Perot Jr Foundation**EIN:** 43-1964344

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Income Tax	15,000	0		0
Foreign Tax-Petrus Special Situations Fund LP	417	417		0
Foreign Tax-Petrus Securities LP	32	32		0