



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



Form 990-PF



Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.

▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

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 SAN ANGELO HEALTH FOUNDATION		A Employer identification number 75-1315145	
Number and street (or P O box number if mail is not delivered to street address) P O BOX 3550		B Telephone number (see instructions) (325) 486-0185	
City or town, state or province, country, and ZIP or foreign postal code SAN ANGELO, TX 76902		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 61,261,123		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	174	174		
	4 Dividends and interest from securities.	31,039	817,679		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	11,146,422			
	b Gross sales price for all assets on line 6a 52,526,217				
	7 Capital gain net income (from Part IV, line 2) . . .		2,022,655		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
Operating and Administrative Expenses	11 Other income (attach schedule)	 147,865	5,853,675		
	12 Total. Add lines 1 through 11	11,325,500	8,694,183		
	13 Compensation of officers, directors, trustees, etc	154,200	12,799		141,401
	14 Other employee salaries and wages	56,000	1,624		54,376
	15 Pension plans, employee benefits	15,514	1,064		14,450
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	 32,461	16,454		16,454
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	 233,056	21,587		12,527
	19 Depreciation (attach schedule) and depletion . . .	 115,281	7,805		
	20 Occupancy	25,566	1,754		23,812
	21 Travel, conferences, and meetings				
	22 Printing and publications	5,233			5,233
	23 Other expenses (attach schedule)	 409,034	287,354		88,475
	24 Total operating and administrative expenses. Add lines 13 through 23	1,046,345	350,441		356,728
	25 Contributions, gifts, grants paid	2,105,136			2,327,961
	26 Total expenses and disbursements. Add lines 24 and 25	3,151,481	350,441		2,684,689
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	8,174,019			
	b Net investment income (if negative, enter -0-)		8,343,742		
	c Adjusted net income (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	200	200	200
	2	Savings and temporary cash investments	179,005	169,184	169,185
	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	10,552	20,445	20,445
	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 ▶ _____ 1,061,819 Less accumulated depreciation (attach schedule) ▶ _____	765,091	1,061,819	1,061,819
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	41,400,394	49,215,783	54,165,667
	14	Land, buildings, and equipment basis ▶ _____ 5,395,319 Less accumulated depreciation (attach schedule) ▶ _____ 1,609,351	3,901,248	3,785,968	5,843,807
15	Other assets (describe ▶ _____)	8,421,024	4,949,884		
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	54,677,514	59,203,283	61,261,123	
Liabilities	17	Accounts payable and accrued expenses	96,926	142,641	
	18	Grants payable	638,821	415,997	
	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)	735,747	558,638	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	53,941,767	58,644,645	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	53,941,767	58,644,645	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	54,677,514	59,203,283	

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	53,941,767
2	Enter amount from Part I, line 27a	2	8,174,019
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	62,115,786
5	Decreases not included in line 2 (itemize) ▶ _____	5	3,471,141
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	58,644,645

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				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (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				
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	2,022,655
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			
2011			
2010			
2009			
2008			
2 Total of line 1, column (d).			2
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
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.			4
5 Multiply line 4 by line 3.			5
6 Enter 1% of net investment income (1% of Part I, line 27b).			6
7 Add lines 5 and 6.			7
8 Enter qualifying distributions from Part XII, line 4.			8

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See
the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)			
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% of Part I, line 27b		1	166,875
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	
3 Add lines 1 and 2.		3	166,875
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	166,875
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	189,000	
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d.		7	189,000
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached		8	377
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	21,748
11 Enter the amount of line 10 to be Credited to 2014 estimated tax ☐ 21,748 Refunded ☐		11	

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?	1a	Yes	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>	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 ☐ \$ _____ (2) On foundation managers ☐ \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____			
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		No
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		No
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? Website address ▶sahfoundation.org	13	Yes	
14	The books are in care of ▶OLIVER RAINEY & WOJTEK Telephone no ▶(325) 942-6713 Located at ▶2909 SHERWOOD WAY STE 300 SAN ANGELO TX ZIP +4 ▶76901			
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? See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶	16	Yes	No

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 ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see 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?. ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>).	3b		No
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))?	☐ Yes	☒ No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☒ No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes	☒ No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).	☐ Yes	☒ No	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes	☒ No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	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		No

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
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
VICKI FORD	ADMIN OFFICER	57,200	4,004	
PO BOX 3550	40 00			
SAN ANGELO, TX 76902				
Total number of other employees paid over \$50,000.				

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
RUSSELL INVESTMENTS	INVESTMENT FEES	257,071
909 A STREET		
TACOMA, WA 98402		
Total number of others receiving over \$50,000 for professional services.		

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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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

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	52,309,407
b	Average of monthly cash balances.	1b	127,543
c	Fair market value of all other assets (see instructions).	1c	7,343,335
d	Total (add lines 1a, b, and c).	1d	59,780,285
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	
3	Subtract line 2 from line 1d.	3	59,780,285
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	896,704
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	58,883,581
6	Minimum investment return. Enter 5% of line 5.	6	2,944,179

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	2,944,179
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	166,875
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	166,875
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	2,777,304
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	2,777,304
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	2,777,304

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	2,684,689
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	2,684,689
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,684,689
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				2,777,304
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			961,822	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 2,684,689			961,822	
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				1,722,867
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				1,054,437
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . .				

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))

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

TOM EARLY
PO BOX 3550
SAN ANGELO, TX 769023550
(325) 486-0185

b

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

SEE WEB SITE AT WWW.SAHFOUNDATION.ORG

c

Any submission deadlines

2-3 MONTHS PRIOR TO WHEN A DECISION IS NEEDED

d

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

SAN ANGELO, TEXAS AREA

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	2,327,961
b Approved for future payment				
SALVATION ARMY 215 GILLIS SAN ANGELO, TX 76903	NONE	501-C3	CORE SUPPORT	56,250
CHANGE IN ACCRUED GRANTS BETWEEN YEARS PO BOX 3550 SAN ANGELO, TX 76902	NONE	501-C3	CHANGE IN ACCRUED GRANTS BETWEEN YEARS	-222,825
Total			3b	166,575

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
FL STEPHENS	Advisor Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
MIKE BOYD	Chairman 4 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
KAREN PFLUGER	Advisor Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
JOE B WILKINSON MD	Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
GEORGE ALEXANDER	Advisor Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
DAVID LUPTON	Treasurer 4 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
O STERLING GILLIS MD	Advisor Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
SANDE VINCENT HARRISON	TRUSTEE 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
DEVIN BATES	Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
JOHN MARK MCLAUGHLIN	Advisor Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
T RICHEY OLIVER CPA	Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
JAMES P CUMMINGS	Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
MARY JANE STEADMAN	Secretary 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
MARILYN ABOUSSIE	VICE CHAIRMAN 4 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
HUGH LAMAR STONE III	Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
JOANNE RICE	Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
ROBERT S PATYRAK MD	Trustee 4 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
STEVE CECIL	Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
RICK DEHOYOS ATTY	ADVISOR TRUSTEE 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				
TOM EARLY	PRESIDENT 40 00	153,000	10,710	
PO BOX 3550 SAN ANGELO,TX 76902				
CARLOS RODRIGUEZ	Trustee 2 00	0		
PO BOX 3550 SAN ANGELO,TX 76902				

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)				
a <i>Paid during the year</i>				
ALCOHOL & DRUG ABUSE COUNCIL 3553 W HOUSTON HARTE EXPWY SAN ANGELO, TX 76901	NONE	501-C3	CAPITAL PROJECT FEASIBILITY STUDY AND FIRE ALARM UPGRADE	15,780
BALLINGER CITY PARK BOARD PO BOX 497 BALLINGER, TX 76821	NONE	170-C1	ESTABLISH A CHILDREN'S COMMUNITY PARK	40,000
AMERICAN RED CROSS PO BOX 3465 SAN ANGELO, TX 76902	NONE	501-C3	CONSUMABLES FOR DISASTER RELIEF FOR WEST CENTRAL TEXAS	12,665
HOWARD COLLEGE 3501 N US HWY 67 SAN ANGELO, TX 76905	NONE	170-C1	CONSTRUCTION OF NEW CLASSROOM AND STUDENT SERVICE FACILITIES	1,000,000
ESPERANZA HEALTH & DENTAL CENTERS 2033 W BEAUREGARD SAN ANGELO, TX 76901	NONE	501-C3	REPLACEMENT OF SERVERS AND COMPUTERS	78,016
CONCHO CHRISTMAS CELEBRATION PO BOX 1991 SAN ANGELO, TX 76902	NONE	501-C3	ADDITIONAL SCENE TO BE DISPLAYED NEAR VISITOR CENTER	27,000
CONCHO VALLEY RAPE CRISIS CENTER 2002 COLORADO AVENUE SAN ANGELO, TX 76901	NONE	501-C3	STAFFING TO INCREASE SERVICES	67,209
MEALS FOR THE ELDERLY 310 E HOUSTON HARTE EXPWY SAN ANGELO, TX 76903	NONE	501-C3	DELIVERY VAN TO EXPAND SERVICES INTO RURAL COMMUNITIES OF TOM GREEN COUNTY	35,000
BRONTE HEALTH & REHAB 900 S STATE BRONTE, TX 76932	NONE	501-C3	CARE CHARTING EQUIPMENT	20,000
GIRL SCOUTS OF CENTRAL TEXAS 304 W AVENUE A SAN ANGELO, TX 76903	NONE	501-C3	FACILITY IMPROVEMENTS	30,458
FELLOWSHIP OF CHRISTIAN ATHLETES 2201 SHERWOOD WAY STE LL1 SAN ANGELO, TX 76901	NONE	501-C3	ADDITIONAL STAFF AND CORE SUPPORT	30,000
HOUSE OF FAITH 321 MONTECITO DRIVE SAN ANGELO, TX 76903	NONE	501-C3	TEAM STEP FORWARD SCHOLARSHIP FUNDING FOR HIGHER EDUCATION OPPORTUNITIES FOR QUALIFYING STUDENTS	110,620
MENARD COUNTY HOSPITAL DISTRICT PO BOX 608 MENARD, TX 76859	NONE	170-C1	EMERGENCY MEDICAL SERVICES BUILDING PROJECT	139,928
MHMR OF THE CONCHO VALLEY 1501 W BEAUREGARD AVENUE SAN ANGELO, TX 76901	NONE	501-C3	OFFICE FURNITURE AND EQUIPMENT FOR NEW PROGRAMS	233,552
SALVATION ARMY 215 GILLIS SAN ANGELO, TX 76903	NONE	501-C3	CORE SUPPORT	18,750
Total  3a				2,327,961

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)				
a <i>Paid during the year</i>				
SAN ANGELO AREA FOUNDATION 221 S IRVING STREET SAN ANGELO, TX 76901	NONE	501-C3	SCHOLARSHIP FUND HONORING ADVISORY TRUSTEE	10,000
SAN ANGELO CIVIC BALLET 15 W BEAUREGARD SAN ANGELO, TX 76903	NONE	501-C3	NEW PROGRAMMING AND MARKETING	18,300
TOM GREEN COUNTY SHERIFFS OFFICE 112 W BEAUREGARD SAN ANGELO, TX 76903	NONE	170-C1	VIDEO CAMERA FOR THE MENTAL HEALTH UNIT	8,000
WEST TEXAS COUNSELING & GUIDANCE 2001 COLORADO AVENUE SAN ANGELO, TX 76901	NONE	501-C3	ADDITIONAL COUNSELORS AND TECHNOLOGY UPGRADES	73,607
WEST TEXAS COUNSELING & GUIDANCE 2001 COLORADO AVENUE SAN ANGELO, TX 76901	NONE	501-C3	ADDITIONAL COUNSELORS FOR YOUTH SERVICES	35,240
TOM GREEN COUNTY LIBRARY 113 W BEAUREGARD SAN ANGELO, TX 76903	NONE	501-C3	FACILITY EXPANSION	50,000
YOUNG LIFE PO BOX 61816 SAN ANGELO, TX 76906	NONE	501-C3	START UP SUPPORT TO ESTABLISH YOUTH PROGRAM IN SAN ANGELO	35,000
CONCHO VALLEY HOME FOR GIRLS 412 PREUSSER SAN ANGELO, TX 76903	NONE	501-C3	SEASONAL GRANT	2,500
BOYS AND GIRLS CLUB OF SAN ANGELO 1802 N LILLIE SAN ANGELO, TX 76903	NONE	501-C3	SEASONAL GRANT	2,500
CHILDRENS ADVOCACY CENTER OFTGC 317 KOBERLIN SAN ANGELO, TX 76903	NONE	501-C3	PARENT MENTORING PROGRAM	70,000
SALVATION ARMY 215 GILLIS SAN ANGELO, TX 76903	NONE	501-C3	SEASONAL GRANT	3,000
WEST TEXAS BOYS RANCH 10223 BOYS RANCH ROAD SAN ANGELO, TX 76904	NONE	501-C3	RENOVATIONS TO COTTAGES AND SEWAGE LIFT STATION	28,450
ANGELO STATE UNIVERSITY PO BOX 10022 ASU STATION SAN ANGELO, TX 76909	NONE	170-C1	FIELDTURF FOR THE PRACTICE FIELD	100,000
SAN ANGELO GARDEN CLUB 815 S ABE SAN ANGELO, TX 76903	NONE	501-C3	MISTERS FOR INTERNATIONAL WATER LILY COLLECTION AT CIVIC LEAGUE PARK	20,000
COUNCIL ON FOUNDATIONS 2121 CRYSTAL DRIVE STE 700 ARLINGTON, VA 22202	NONE	501-C3	SUPPORT FOR MEMBERSHIP ORGANIZATION	5,350
Total  3a				2,327,961

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)				
a <i>Paid during the year</i>				
MOSAIC REDWINE CHILDCARE CENTER 5191 S BRYANT BLVD SAN ANGELO,TX 76904	NONE	501-C3	SEASONAL GRANT	1,500
CONFERENCE OF SOUTHWEST FOUNDATIONS 624 N GOOD LATIMER EXPY DALLAS,TX 75204	NONE	501-C3	SUPPORT FOR PHILANTHROPIC MEMBERSHIP ORGANIZATION	2,000
EDUCATION SERVICE CENTER REGION XV 612 S SIRENE STREET SAN ANGELO,TX 76903	NONE	170-C1	"WHY TRY" YOUTH CHARACTER EDUCATION PROGRAM	11,006
CHILDRENS ADVOCACY CENTER OF TGC 317 KOBERLIN SAN ANGELO,TX 76903	NONE	501-C3	SEASONAL GRANT	2,000
HOUSE OF FAITH 321 MONTECITO DRIVE SAN ANGELO,TX 76903	NONE	501-C3	SEASONAL GRANT	3,000
SAN ANGELO STATE SCHOOL PO BOX 38 CARLSBAD,TX 76934	NONE	501-C3	SEASONAL GRANT	1,500
SAFE KIDS COALITION 3501 KNICKERBOCKER ROAD SAN ANGELO,TX 76904	NONE	501-C3	REFUND OF UNUSED GRANT	-13,600
CITY OF SAN ANGELO 52 W COLLEGE SAN ANGELO,TX 76903	NONE	170-C1	REFUND OF UNUSED GRANT	-110
TOM GREEN COUNTY SHERIFFS OFFICE 112 W BEAUREGARD SAN ANGELO,TX 76903	NONE	170-C1	REFUND OF UNUSED GRANT	-260
Total			3a	2,327,961

Form 990PF Part XVI-A Line 11 - Other revenue:

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See the instructions)
11 Other revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
a FACILITY REIMBURSEMENT			3	1,053	
b INCOME REPORTED ELSEWHERE			14	-5,705,810	
c OIL/GAS ROYALTIES & BONUS			15	145,023	
d RUSSELL CORE BOND FUND			14	121,486	
e RUSSELL DEFENSIVE U S			14	751,914	
f RUSSELL EMERGING MARKETS			14	-16,153	
g RUSSELL INT'L EQUITY			14	1,624,665	
h RUSSELL LARGE CAP U S			14	2,771,915	
i RUSSELL SMALL CAP U S			14	451,983	
j SECURITIES SETTLEMENTS			14	1,789	

TY 2013 Accounting Fees Schedule**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	16,311	8,136	0	8,136
AUDIT AND TAX RETURN FEES	16,150	8,318	0	8,318

TY 2013 Contractor Compensation Explanation**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145**Software ID:** 13000170**Software Version:** 2013v3.1

Contractor	Explanation
RUSSELL INVESTMENTS	

TY 2013 Investments - Land Schedule

Name: SAN ANGELO HEALTH FOUNDATION

EIN: 75-1315145

Software ID: 13000170

Software Version: 2013v3.1

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Land	1,061,819		1,061,819	1,061,819

TY 2013 Land, Etc. Schedule

Name: SAN ANGELO HEALTH FOUNDATION

EIN: 75-1315145

Software ID: 13000170

Software Version: 2013v3.1

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	164,043	164,043		20,000
Machinery and Equipment	40,930	40,930		10,000
Buildings	4,469,156	1,149,834	3,319,322	4,469,156
Land	466,646		466,646	861,510
Miscellaneous	254,544	254,544		483,141

TY 2013 Other Assets Schedule**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145**Software ID:** 13000170**Software Version:** 2013v3.1

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
UNREALIZED GAIN ON INVESTMENTS	8,421,024	4,949,884	

TY 2013 Other Expenses Schedule

Name: SAN ANGELO HEALTH FOUNDATION

EIN: 75-1315145

Software ID: 13000170

Software Version: 2013v3.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES AND SUBSCRIPTIONS	2,530	174		2,356
EMPLOYEE HEALTH INSURANCE	15,922	1,078		14,844
INSURANCE	23,369	11,685		11,685
INVESTMENT FEES	304,593	257,071		
OFFICE EXPENSES	6,977	479		6,498
OTHER EXPENSE	3,613	46		622
POSTAGE	647	44		603
REPAIRS AND MAINTENANCE	17,058	1,466		19,897
RUSSELL CORE BOND FUND		5,316		
RUSSELL DEFENSIVE US EQUITY FUND		850		
RUSSELL EMERGING MARKETS EQUITY PLUS FUN		761		
RUSSELL INTERNATIONAL EQUITY FUND		3,822		
RUSSELL LARGE CAP US EQUITY FUND		1,999		
RUSSELL SMALL CAP US EQUITY FUND		208		
STAFF TRAVEL, MEETINGS AND TRAINING	28,377	1,947		26,430
TELEPHONE & WEB PAGE	5,948	408		5,540

TY 2013 Other Income Schedule**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145**Software ID:** 13000170**Software Version:** 2013v3.1

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FACILITY REIMBURSEMENT	1,053	1,053	
INCOME REPORTED ELSEWHERE	-5,705,810		
OIL/GAS ROYALTIES & BONUS	145,023	145,023	
RUSSELL CORE BOND FUND	121,486	121,486	
RUSSELL DEFENSIVE U S	751,914	751,914	
RUSSELL EMERGING MARKETS	-16,153	-16,153	
RUSSELL INT'L EQUITY	1,624,665	1,624,665	
RUSSELL LARGE CAP U S	2,771,915	2,771,915	
RUSSELL SMALL CAP U S	451,983	451,983	
SECURITIES SETTLEMENTS	1,789	1,789	

TY 2013 Taxes Schedule**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145**Software ID:** 13000170**Software Version:** 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	198,942			
PAYROLL TAX	13,450	923		12,527
PROPERTY TAXES	20,664	20,664		