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.

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning , 2013, and ending , 20

Name of foundation: GEORGE A. ROBINSON IV FOUNDATION

A Employer identification number: 76-0399825

Number and street (or P O box number if mail is not delivered to street address): 5005 RIVERWAY, SUITE 200 | Room/suite

B Telephone number (see instructions): (713) 627-3884

City or town, state or province, country, and ZIP or foreign postal code: HOUSTON, TX 77056

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: [X] 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) ▶ $ 5,632,042.

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

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

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	2,083.	2,083.		ATCH 1
	4 Dividends and interest from securities	90,612.	90,612.		ATCH 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	101,005.			
	b Gross sales price for all assets on line 6a 1,424,442.				
	7 Capital gain net income (from Part IV, line 2)		101,005.		
	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)				
	11 Other income (attach schedule) ATCH 3	478,683.	498,083.		
	12 **Total.** Add lines 1 through 11	672,383.	691,783.	0	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) ATCH 4	4,942.	4,942.		
	c Other professional fees (attach schedule)	21,126.	21,126.		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) ATCH 6	47,245.	41,296.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	73,313.	67,364.		
	25 Contributions, gifts, grants paid	250,625.			250,625.
	26 **Total expenses and disbursements** Add lines 24 and 25	323,938.	67,364.	0	250,625.
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	348,445.			
	b **Net investment income** (if negative, enter -0-)		624,419.		
	c **Adjusted net income** (if negative, enter -0-)			0	

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Part II Balance Sheets — Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets			
1 Cash - non-interest-bearing			
2 Savings and temporary cash investments	1,921,401.	3,302,280.	3,302,280.
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 ATCH 7	8,360.	5,960.	5,960.
10 a Investments - U S and state government obligations (attach schedule)			
b Investments - corporate stock (attach schedule) ATCH 8	1,905,870.	1,285,823.	1,789,107.
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) ATCH 9	396,535.		
14 Land, buildings, and equipment basis ▶			
Less accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶ ATCH 10)	3.	3.	534,695.
16 **Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	4,232,169.	4,594,066.	5,632,042.
Liabilities			
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 ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
24 Unrestricted			
25 Temporarily restricted			
26 Permanently restricted			
Foundations that do not follow SFAS 117, ▶ ☒ check here and complete lines 27 through 31.			
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	4,232,169.	4,594,066.	
30 **Total net assets or fund balances** (see instructions)	4,232,169.	4,594,066.	
31 **Total liabilities and net assets/fund balances** (see instructions)	4,232,169.	4,594,066.	

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	4,232,169.
2 Enter amount from Part I, line 27a	2	348,445.
3 Other increases not included in line 2 (itemize) ▶ ATCH 11	3	13,452.
4 Add lines 1, 2, and 3	4	4,594,066.
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,594,066.

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 PART IV SCHEDULE			
b				
c				
d				
e				

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(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				
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	101,005.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	0

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	235,000.	5,089,032.	0.046178
2011	232,500.	4,971,590.	0.046766
2010	208,500.	4,603,233.	0.045294
2009	230,953.	4,163,535.	0.055470
2008	234,716.	4,773,435.	0.049171

2 **Total** of line 1, column (d)	2	0.242879
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	0.048576
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	5,328,496.
5 Multiply line 4 by line 3	5	258,837.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,244.
7 Add lines 5 and 6	7	265,081.
8 Enter qualifying distributions from Part XII, line 4	8	250,625.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

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	12,488.
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	12,488.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	**Tax based on investment income** Subtract line 4 from line 3 If zero or less, enter -0-	5	12,488.
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 — 6a: 5,960.		
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	5,960.
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	6,528.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
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		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c	N/A	
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ 0 (2) On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
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? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ ROBERT S. PULITZER Telephone no ▶ 713-627-3884

Located at ▶ 5005 RIVERWAY, SUITE 200, HOUSTON, TX ZIP+4 ▶ 77056

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 N/A

			Yes	No
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		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶ N/A			

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 instructions)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 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 ▶ ____, ____, ____, ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions)	2b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ____, ____, ____, ____			
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? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)*	3b	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		X

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

5a During the year did the foundation pay or incur any amount to			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	Yes [ ] No [X]		
(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 [X]		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	Yes [ ] No [X]		
(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 [X]		
(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 [X]		
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	N/A
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?	Yes [ ] No [ ]		
If "Yes," attach the statement required by Regulations section 53 4945-5(d)			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	Yes [ ] No [X]		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	No: X
If "Yes" to 6b, file Form 8870			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	Yes [ ] No [X]		
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	N/A

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
ATCH 12		0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1 - see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶

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 ▶		

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

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

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See instructions 3 NONE	
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	2,610,095.
b	Average of monthly cash balances	1b	2,468,189.
c	Fair market value of all other assets (see instructions)	1c	331,357.
d	**Total** (add lines 1a, b, and c)	1d	5,409,641.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	5,409,641.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	81,145.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	5,328,496.
6	**Minimum investment return.** Enter 5% of line 5	6	266,425.

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	266,425.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	12,488.		
b	Income tax for 2013 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	12,488.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	253,937.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	253,937.
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	253,937.

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	250,625.
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	250,625.
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	250,625.

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				253,937.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			243,273.	
b Total for prior years 20 11 ,20 10 ,20 09				
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	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 250,625.				
a Applied to 2012, but not more than line 2a			243,273.	
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2013 distributable amount				7,352.
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				246,585.
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	0			
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) NOT APPLICABLE

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV Supplementary Information (Complete this part only if the foundation 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))

N/A

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

NONE

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

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

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

ATCH 13

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

NO FORMAL APPLICATION GUIDELINES. SEND ONE COPY OF FULL PROPOSAL.

c Any submission deadlines

NONE

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

NONE

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ATCH 14				
Total ▶ 3a				250,625.
b Approved for future payment				
ATCH 15				
Total ▶ 3b				450,000.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	2,083.	
4 Dividends and interest from securities			14	90,612.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	101,005.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b ATCH 16				478,683.	
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				672,383.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 672,383.

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
	NOT APPLICABLE

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

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

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

b If "Yes," complete the following schedule

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

Sign Here

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

Signature of officer or trustee: [signature] Date: 5/14/14 Title: Vice President

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
MARY ANN TROSTLE	Mary Ann Trostle	5/13/2014		P00745680

Firm's name ▶ MCGLADREY LLP Firm's EIN ▶ 42-0714325

Firm's address ▶ 1400 POST OAK BLVD., STE 900 HOUSTON, TX 77056-3009 Phone no 713-625-3500

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		MERRILL LYNCH - SEE ATTACHED PROPERTY TYPE: SECURITIES				P	VARIOUS	12/31/2013
208,046.		267,800.					-59,754.	
		MERRILL LYNCH - SEE ATTACHED PROPERTY TYPE: SECURITIES				P	VARIOUS	12/31/2013
87,773.		83,778.					3,995.	
		MERRILL LYNCH - SEE ATTACHED					VARIOUS	12/31/2013
433,926.		427,185.					6,741.	
		25,188 SHS SPDR GOLD TRUST PROPERTY TYPE: SECURITIES				P	09/08/2009	12/31/2013
1,238.		874.					364.	
		2,943 UNITS SPECTRA ENERGY PARTNERS, LP PROPERTY TYPE: SECURITIES				P	04/26/2011	12/31/2013
137,106.		95,144.					41,962.	
		2,932 SHS LINN ENERGY, LLC PROPERTY TYPE: SECURITIES				P	VARIOUS	07/05/2013
72,771.		80,380.					-7,609.	
		2,107 UNITS ENTERPRISE PRODUCTS PARTNERS PROPERTY TYPE: SECURITIES				D	04/26/2011	12/31/2013
131,360.		85,116.					46,244.	
		7,122 UNITS REGENCY ENERGY PARTNERS LP PROPERTY TYPE: SECURITIES				P	VARIOUS	12/31/2013
175,179.		161,659.					13,520.	
		1,080 UNITS REGENCY ENERGY PARTNERS LP PROPERTY TYPE: SECURITIES				P	12/03/2013	12/10/2013
26,068.		26,050.					18.	
		5,776 UNITS PVR PARTNERS, LP PROPERTY TYPE: SECURITIES				P	VARIOUS	12/31/2013
150,975.		95,451.					55,524.	
TOTAL GAIN(LOSS)		....					101,005.	

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME
CADENCE BANK	269.	269.	
MERRILL LYNCH	1,814.	1,814.	
TOTAL	2,083.	2,083.	

ATTACHMENT 2

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME
MERRILL LYNCH	90,612.	90,612.	
TOTAL	90,612.	90,612.	

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME
ROYALTY INCOME	322,051.	322,051.	
NET PARTNERSHIP INCOME- SPECTRA ENERGY	57,458.	43,321.	
LESS: CAPITAL GAIN INCLUDED ON SCH D	-41,962.		
NET PARTNERSHIP INCOME- LINN ENERGY	8,899.	-19,768.	
PLUS: CAPITAL LOSS INCLUDED ON SCH D	7,609.		
NET PARTNERSHIP INCOME- ENTERPRISE PRODU	73,323.	57,677.	
LESS: CAPITAL GAIN INCLUDED ON SCH D	-46,244.		
NET PARTNERSHIP INCOME- REGENCY ENERGY	87,656.	35,071.	
LESS: CAPITAL GAIN INCLUDED ON SCH D	-13,538.		
NET PARTNERSHIP INCOME- PVR PARTNERS LP	78,926.	59,702.	
LESS: CAPITAL GAIN INCLUDED ON SCH D	-55,524.		
MISCELLANEOUS INCOME	29.	29.	
TOTALS	478,683.	498,083.	

ATTACHMENT 4

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ACCOUNTING FEES	4,942.	4,942.		
TOTALS	4,942.	4,942.		

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	1,804.	1,804.		
CONSULTING FEES	19,322.	19,322.		
TOTALS	21,126.	21,126.		

ATTACHMENT 6

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
AD VALOREM TAXES	541.	541.		
PRODUCTION TAXES	36,309.	36,309.		
FOREIGN TAX	4,446.	4,446.		
EXCISE TAX	5,949.			
TOTALS	47,245.	41,296.		

ATTACHMENT 7

FORM 990PF, PART II - PREPAID EXPENSES AND DEFERRED CHARGES

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
PREPAID EXCISE TAX	5,960.	5,960.
TOTALS	5,960.	5,960.

ATTACHMENT 8

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
CORPORATE STOCK - VARIOUS	1,285,823.	1,789,107.
TOTALS	1,285,823.	1,789,107.

ATTACHMENT 9

FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
REGENCY ENERGY PARTNERS, LP	NONE	NONE
SPECTRA ENERGY PARTNERS LP	NONE	NONE
ENTERPRISE PRODUCTS PARTNERS	NONE	NONE
PVR PARTNERS LP	NONE	NONE
LINN ENERGY LLC	NONE	NONE
TOTALS		

ATTACHMENT 10

FORM 990PF, PART II - OTHER ASSETS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
NET OIL AND GAS PROPERTIES	3.	534,695.
TOTALS	3.	534,695.

ATTACHMENT 11

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION		AMOUNT
BASIS ADJUSTMENT		13,452.
	TOTAL	13,452.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 12

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
GEORGE A. ROBINSON IV 5005 RIVERWAY, SUITE 200 HOUSTON, TX 77056	PRESIDENT/TRUSTEE .50	0	0	0
ROBERT S. PULITZER 5005 RIVERWAY, SUITE 200 HOUSTON, TX 77056	VP/ TREAS/TRUSTEE 1.00	0	0	0
JAY HOUREN 2727 ALLEN PARKWAY, SUITE 1700 HOUSTON, TX 77019	SECRETARY/TRUSTEE .50	0	0	0
LARRY HOLLIER, MD 5005 RIVERWAY, SUITE 200 HOUSTON, TX 77056	TRUSTEE .50	0	0	0
	GRAND TOTALS	0	0	0

ATTACHMENT 13

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

ROBERT S. PULITZER
5005 RIVERWAY, SUITE 200
HOUSTON, TX 77056
713-627-9440

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SAINT MARY'S HALL 9401 STARCREST DR SAN ANTONIO, TX 78217	NONE 501 (C)3	GENERAL FUND	500
TEXAS CHILDREN'S HOSPITAL 6701 FANNIN ST , SUITE 610 HOUSTON, TX 77030	NONE 501(C)3	GENERAL FUND	110,000
BAYLOR COLLEGE OF MEDICINE ONE BAYLOR PLAZA, MS BCM160 HOUSTON, TX 77030	NONE 501(C)3	JOSEPHINE ABERCROMBIE ENDOWED PROFESSORSHIP IN PLASTIC SURGERY FUND	50,000
THE TEXAS MUSIC PROJECT 1009 WOODBRIAR DR GRAPEVINE, TX 76051	NONE 501(C)3	GENERAL FUND	50,000
BAYLOR COLLEGE OF MEDICINE ONE BAYLOR PLAZA, MS BCM160 HOUSTON, TX 77030	NONE 501(C)3	GENERAL FUND	20,000
UNIVERSITY OF ST THOMAS HOUSTON, TX 77006	NONE 501(C)3	GENERAL FUND	5,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
FAMILY LEGACY MISSIONS INTERNATIONAL 5005 W ROYAL LN, STE 252 IRVING, TX 75063	NONE 501(C)3	GENERAL FUND	5,000
ORBIT EDUCATION INC 400 W PTREE ST NW UNIT 2213 ATLANTA, GA 30308	NONE 501(C)3	GENERAL FUND	10,125.
		TOTAL CONTRIBUTIONS PAID	250,625.

FORM 990PF, PART XV - CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BAYLOR COLLEGE OF MEDICINE ONE BAYLOR PLAZA, MS BCM160 HOUSTON, TX 77030	NONE 501(C)3	JOSEPHINE ABERCROMBIE ENDOWED PROFESSORSHIP IN PLASTIC SURGERY FUND	50,000
THE TEXAS MUSIC PROJECT 1009 WOODBRIAR DR GRAPEVINE, TX 76051	NONE 501(C)3	GENERAL FUND	400,000.
		TOTAL CONTRIBUTIONS APPROVED	450,000.

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUE

ATTACHMENT 16

DESCRIPTION	BUSINESS CODE	AMOUNT	EXCLUSION CODE	AMOUNT	RELATED OR EXEMPT FUNCTION INCOME
ROYALTY INCOME			15	322,051.	
NET PARTNERSHIP INCOME- SPECTRA ENERGY			01	57,458.	
LESS: CAPITAL GAIN INCLUDED ON SCH D			01	-41,962.	
NET PARTNERSHIP INCOME- LINN ENERGY LLC			01	8,899.	
PLUS: CAPITAL LOSS INCLUDED ON SCH D			01	7,609.	
NET PARTNERSHIP INCOME- ENTERPRISE PRODUCTS			01	73,323.	
LESS: CAPITAL GAIN INCLUDED ON SCH D			01	-46,244.	
NET PARTNERSHIP INCOME- REGENCY ENERGY			01	87,656.	
LESS: CAPITAL GAIN INCLUDED ON SCH D			01	-13,538.	
NET PARTNERSHIP INCOME- PVR PARTNERS			01	78,926.	
LESS: CAPITAL GAIN INCLUDED ON SCH D			01	-55,524.	
MISCELLANEOUS INCOME			01	29.	
TOTALS				478,683.	

GEORGE A. ROBINSON IV

2013 ANNUAL STATEMENT SUMMARY

The following sections are provided to facilitate your review and the preparation of your tax return.

The 2013 Proceeds from Broker and Barter Exchange Transactions section includes both sales of positions for "covered securities" and "noncovered securities." A covered security includes those with a purchase date within the following timeline: Equities acquired on or after January 1, 2011 and Mutual Funds acquired on or after January 1, 2012. Legislation requires reporting the gross proceeds of the sales of "covered" and "noncovered" securities and the adjusted cost basis for "covered securities " Any sale of a security that is considered a "noncovered security" will still be included in this section with the adjusted cost basis (where available)

In calculating gain (loss), unless otherwise noted, it was assumed that the oldest position was liquidated first, and that you have made an election to amortize the premium paid on the purchase of taxable bonds. Under the Cost Basis Reporting Regulations, brokers need not track wash sale activity for substantially identical securities, transactions across accounts, or between covered and non-covered securities. However, you as a taxpayer still have to track and report wash sales as you have in the past which would include all of the aforementioned transaction types Securities distributed from a retirement account reflect the tax basis on the date of distribution. Other methods for calculating gain (loss) are available. The cost basis for most Original Issue Discount ("OID") obligations includes the accretion of OID. For purposes of allocating original purchase price to the components of an equity unit consisting of a purchase contract and a debt security subject to a remarketing event, we assumed that the fair market value of the debt security on purchase date was equal to its adjusted issue price. The difference between your original cost and the amount allocable to the debt component was allocated to the purchase contract. In making adjustments to the cost basis of the purchase contract, it was assumed that the unit holder included contract adjustment payments in income when received.

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

1099-B 2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1e Quantity	Transaction Description	1b Date of Acquisition	1a Date of Sale or Exchange	2a. Amount	3 Cost Basis	5 Wash Sale Loss Disallowed	Gain or (Loss)	Remarks
SHORT TERM CAPITAL GAINS AND LOSSES - 1099-B Line 1c.								
COVERED TRANSACTIONS - 1099-B Line 6b. (cost basis reported to the IRS)								
AMERICAN CAP AGY CORP		*CUSIP Number*	*02503X105*					
2800 0000	Sale	05/13/13	12/05/13	54,222 17	81,312 00	0 00	(27,089 83)	
1294 0000	Sale	05/28/13	12/05/13	25,058 40	34,989 76	0.00	(9,931 36)	
	Security Subtotal			***79,280.57***	***116,301.76***	***0.00***	***(37,021.19)***	
E ON SE ADR		*CUSIP Number*	*268780103*					
503 0000	Sale	01/23/12	01/07/13	9,350 56	10,383 92	0 00	(1,033 36)	
1908 0000	Sale	01/23/12	01/07/13	35,468 94	39,266 64	0 00	(3,797.70)	
	Security Subtotal			***44,819.50***	***49,650.56***	***0.00***	***(4,831.06)***	
EXELON CORPORATION		*CUSIP Number*	*30161N101*					
1789.0000	Sale	03/07/12	01/07/13	53,472 19	68,876 50	0 00	(15,404 31)	
TELECOM C NW ZLND SPNADR		*CUSIP Number*	*879278208*					
1786 0000	Sale	08/28/12	07/01/13	15,254 14	17,574 24	0 00	(2,320.10)	
1782 0000	Sale	06/24/13	07/01/13	15,219 98	15,396 48	0 00	(176 50)	
	Security Subtotal			***30,474.12***	***32,970.72***	***0.00***	***(2,496.60)***	

Attachment 17

GEORGE A. ROBINSON IV

2013 ANNUAL STATEMENT SUMMARY

1099-B 2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1e Quantity	Transaction Description	1b Date of Acquisition	1a Date of Sale or Exchange	2a Amount	3. Cost Basis	5 Wash Sale Loss Disallowed	Gain or (Loss)	Remarks
Covered Short Term Capital Gains and Losses Subtotal				**208,046.38**	**267,799.54**	**0.00**	**(59,753.16)**	
NET SHORT TERM CAPITAL GAINS AND LOSSES				**208,046.38**	**267,799.54**	**0.00**	**(59,753.16)**	
LONG TERM CAPITAL GAINS AND LOSSES - 1099-B Line 1c.								
COVERED TRANSACTIONS - 1099-B Line 6b. (cost basis reported to the IRS)								
E ON SE ADR		*CUSIP Number*	*268780103*					
627 0000	Sale	06/06/11	01/07/13	11,655 66	16,953 95	0 00	(5,298 29)	
TELECOM C NW ZLND SPNADR		*CUSIP Number*	*879278208*					
8912 0000	Sale	11/21/11	07/01/13	76,116 95	66,823 96	0 00	9,292 99	
Covered Long Term Capital Gains and Losses Subtotal				**87,772.61**	**83,777.91**	**0.00**	**3,994.70**	
NONCOVERED TRANSACTIONS - 1099-B Line 6a. (cost basis not reported to the IRS)								
ASTRAZENECA PLC SPND ADR		*CUSIP Number*	*046353108*					
332.0000	Sale	05/26/10	11/21/13	18,192 12	13,618 47	0 00	4,573 65	
E ON SE ADR		*CUSIP Number*	*268780103*					
3807 0000	Sale	06/29/10	01/07/13	70,770 53	103,169 70	0 00	(32,399 17)	
EXELON CORPORATION		*CUSIP Number*	*30161N101*					
2654 0000	Sale	05/26/10	01/07/13	79,326 54	102,065 41	0 00	(22,738 87)	
ELI LILLY & CO		*CUSIP Number*	*532457108*					
331 0000	Sale	05/26/10	01/22/13	17,777.61	10,789 90	0.00	6,987 71	
TOTAL S A SP ADR		*CUSIP Number*	*89151E109*					
449 0000	Sale	06/01/10	10/25/13	27,734 25	20,559 71	0 00	7,174 54	
VECTREN CORP INDIANA COM		*CUSIP Number*	*92240G101*					
489 0000	Sale	05/26/10	03/21/13	17,099 56	11,076 73	0 00	6,022 83	

GEORGE A. ROBINSON IV

2013 ANNUAL STATEMENT SUMMARY

1099-B

2013 PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS

1e. Quantity	Transaction Description	1b Date of Acquisition	1a Date of Sale or Exchange	2a Amount	3 Cost Basis	5 Wash Sale Loss Disallowed	Gain or (Loss)	Remarks
NAVIOS MARITIME PARTNERS LP		*CUSIP Number*	*Y62267102*					
5843.0000	Sale	05/26/10	12/10/13	99,569.99	81,837.83	0.00	17,732.16	TRANSACTION ADDED
1180.0000	Sale	06/07/11	12/10/13	20,108.26	19,039.61	0.00	1,068.65	TRANSACTION ADDED
1141.0000	Sale	08/03/11	12/10/13	19,443.67	15,528.60	0.00	3,915 07	TRANSACTION ADDED
3750.0000	Sale	05/08/12	12/10/13	63,903.40	49,498.87	0.00	14,404.53	TRANSACTION ADDED
	Security Subtotal			*203,025.32*	*165,904.91*	*0.00*	*37,120.41*	
Noncovered Long Term Capital Gains and Losses Subtotal				433,925.93	427,184.83	0.00	6,741.10	
NET LONG TERM CAPITAL GAINS AND LOSSES				521,698.54	510,962.74	0.00	10,735.80	

12/31/2013

							Sale										
	Ordinary Business Income	Other Net Rental Income	Net Section 1231 Gain/Loss	Intangible Drilling Costs	Depletion	Ordinary Income	Capital Gain/Loss	Ordinary Gain/Loss	Royalties	Long Term Capital Gain	Interest Income	Dividend Income	Charitable Contributions	Foreign Tax	Nondeductible Expense	Total Column A
Spectra Energy Partners LP	(9 809)		(419)			(10 228)	41 962	25 724			117		(1)	(41)	(75)	57 458
Linn Energy LLC	4 708		432	(6,169)	(4 228)	(5,257)	(7 609)	21 885			41				(161)	8,899
Enterprise Products Partners, LP	(5 909)		71			(5 838)	46 244	32 920			2				(5)	73,323
Regency Energy Partners, LP	(34,700)		(529)			(35 229)	13 538	109 353			72		(9)		(69)	87,656
PVR Partners LP	(8,496)	81	430		(134)	(8,119)	55,524	31,091	448						(18)	78,926
	(54 206)	81	(15)	(6 169)	(4 362)	(64,671)	149 659	220 973	448	0	232	0	(10)	(41)	(328)	306,262

								Sale										
	Ordinary Business Income	Other Net Rental Income	Net Section 1231 Gain/Loss	Intangible Drilling Costs	Depletion	PY Disallowed Ordinary Loss	Subtotal- Ordinary Income	Capital Gain/Loss	Ordinary Gain/Loss	Long Term Capital Gain	Allowable Ordinary Income/Loss	Carryover to 2013-Disallowed Loss	Royalties	Interest Income	Dividend Income	Charitable Contributions	Foreign Tax	Total Allowable Column B
Spectra Energy Partners LP	(9 809)	-	(419)	-	-	(14 212)	(24 440)	41 962	25 724	-	(24 440)	0	-	117	-	(1)	(41)	43,321
Linn Energy LLC	4 708	-	432	(6 169)	(4 228)	(28 828)	(34 085)	(7,609)	21,885		(34 085)	0	-	41	-	-		(19,768)
Enterprise Products Partners LP	(5 909)	-	71	-	-	(15 651)	(21 489)	48 244	32 920	-	(21 489)	0	-	2	-	-		57 677
Regency Energy Partners, LP	(34 700)	-	(529)	-	-	(52 654)	(87 883)	13 538	109 353	-	(87 883)	0	-	72	-	(9)		35,071
PVR Partners, LP	(8 496)	81	430	-	(134)	(19 242)	(27,361)	55 524	31 091	-	(27,361)	0	448	-	-	-		59,702
	(54 206)	81	(15)	(6,169)	(4,362)	(130 587)	(195 258)	149 659	220 973	0	(195 258)	0	448	232	0	(10)	(41)	176,003

Attachment 20

FEDERAL FOOTNOTES

THE TAXPAYER RECEIVES SERVICES AND FACILITIES FREE OF CHARGE FROM GEORGE A. ROBINSON IV, WHO IS A DISQUALIFIED PERSON, IN THE FORM OF OFFICE SPACE, SUPPLIES, AND OFFICE PERSONNEL TO PERFORM ADMINISTRATIVE AND ACCOUNTING DUTIES.