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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052









2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014 , and ending 12-31-2014

Name of foundation RAUL TIJERINA JR FOUNDATION C/O BORIS A HIDALGO % BORIS A HIDALGO		A Employer identification number 33-1076963	
Number and street (or P O box number if mail is not delivered to street address) 333 CLAY ST STE 3300 Suite 3300		B Telephone number (see instructions) (713) 654-8111	
City or town, state or province, country, and ZIP or foreign postal code HOUSTON, TX 77002		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 12,228,981		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		(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)	0			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	309,085	309,085	0	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	650,373			
	b Gross sales price for all assets on line 6a 1,071,195				
	7 Capital gain net income (from Part IV, line 2) . . .		650,373		
	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)	92,654	92,654	0	
	12 Total. Add lines 1 through 11	1,052,112	1,052,112	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)	3,975	2,981	0	994
	c Other professional fees (attach schedule)	34,971	26,228	0	8,743
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	27,479	7,281	0	0
	19 Depreciation (attach schedule) and depletion	535	535	0	
	20 Occupancy				
	21 Travel, conferences, and meetings	3,006	752	0	2,254
	22 Printing and publications				
	23 Other expenses (attach schedule)	22,295	22,295	0	0
	24 Total operating and administrative expenses. Add lines 13 through 23	92,261	60,072	0	11,991
	25 Contributions, gifts, grants paid	597,447			597,447
	26 Total expenses and disbursements. Add lines 24 and 25	689,708	60,072	0	609,438
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	362,404			
	b Net investment income (if negative, enter -0-)		992,040		
c Adjusted net income (if negative, enter -0-)				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	264,758	59,257	59,257
	2	Savings and temporary cash investments	351,854	698,020	698,020
	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	7,781	20,200	20,200
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	6,396,943	 6,466,518	7,576,696
	c	Investments—corporate bonds (attach schedule).	3,619,389	 3,748,666	3,747,547
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	35,669	 35,134	111,020
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	 5,466	 16,241	 16,241	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	10,681,860	11,044,036	12,228,981	
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 ▶ _____)	 228	 0	
	23	Total liabilities (add lines 17 through 22)	228	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	10,681,632	11,044,036	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> 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 instructions)	10,681,632	11,044,036	
	31	Total liabilities and net assets/fund balances (see instructions)	10,681,860	11,044,036	

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)	110681632
2	Enter amount from Part I, line 27a	362404
3	Other increases not included in line 2 (itemize) ▶ _____	
4	Add lines 1, 2, and 3	11044036
5	Decreases not included in line 2 (itemize) ▶ _____	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	11044036

Part IV

Capital Gains and Losses for Tax on Investment Income

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

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(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	See Additional Data Table		
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	650,373
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 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))
2013	530,607	11,548,309	0 045947
2012	549,783	10,867,667	0 050589
2011	521,575	11,253,793	0 046347
2010	456,052	10,851,186	0 042028
2009	545,443	9,760,203	0 055884

2	Total of line 1, column (d).	2	0 240795
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 048159
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	12,249,312
5	Multiply line 4 by line 3.	5	589,915
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	9,920
7	Add lines 5 and 6.	7	599,835
8	Enter qualifying distributions from Part XII, line 4.	8	609,438

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 VIExcise 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)

1

9,920

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

9,920

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

9,920

6

Credits/Payments

6a

2014 estimated tax payments and 2013 overpayment credited to 2014

20,200

6b

Exempt foreign organizations—tax withheld at source

6c

Tax paid with application for extension of time to file (Form 8868)

6d

Backup withholding erroneously withheld

7

Total credits and payments. Add lines 6a through 6d.

7

20,200

8

Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.

8

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed.

9

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.

10

10,280

11

Enter the amount of line 10 to be Credited to 2015 estimated tax 10,280 Refunded

11

Part VII-AStatements 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

No

1b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?

1b

No

1c

Did the foundation file Form 1120-POL for this year?

1c

No

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?

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? If "Yes," attach a conformed copy of the changes.

3

No

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a

No

4b

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?

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

Yes

7

Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.

7

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions):
TX

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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)?
If "Yes," complete Part XIV

9

No

10

Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

10

No

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Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No		
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No		
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes			
Website address ▶ <u>www.RaulTijerinaJrFoundation.org</u>						
14	The books are in care of ▶ <u>BORIS A HIDALGO</u> Telephone no ▶ <u>(713) 654-8111</u> Located at ▶ <u>333 CLAY ST SUITE 3300 HOUSTON TX</u> ZIP +4 ▶ <u>77002</u>					
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ <table><tr><td>15</td><td></td></tr></table>	15				
15						
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No		
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶						

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? 1b Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>			
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 2014? 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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2014 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 2014.</i>) 3b			
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	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 4945(d)(4)(A)? (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

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

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?

☐ Yes ☒ No

b

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

7b

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
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

Total number of other employees paid over \$50,000.

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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
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 NONE	
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 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	11,733,640
b	Average of monthly cash balances.	1b	554,749
c	Fair market value of all other assets (see instructions).	1c	147,461
d	Total (add lines 1a, b, and c).	1d	12,435,850
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	0
3	Subtract line 2 from line 1d.	3	12,435,850
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	186,538
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	12,249,312
6	Minimum investment return. Enter 5% of line 5.	6	612,466

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	612,466
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	9,920
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	9,920
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	602,546
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	602,546
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	602,546

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	609,438
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	609,438
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	9,920
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	599,518
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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				602,546
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			550,752	
b Total for prior years 2012 , 2011 , 2010				
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 609,438				
a Applied to 2013, but not more than line 2a			550,752	
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 2014 distributable amount.				58,686
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:	0			
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 2013 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				543,860
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . .				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . .	0			

Part XIVPrivate 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 2014, 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) 2014	(b) 2013	(c) 2012	(d) 2011		
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 XVSupplementary 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))

NONE

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

RAUL TIJERINA JR FOUNDATION
C/O BORIS HIDALGO 333 CLAY STREET
HOUSTON, TX 770024499
(713) 951-5857

b

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

THE RAUL TIJERINA JR FOUNDATION GRANT APPLICATION GUIDELINES CAN BE FOUND AT THE FOUNDATION'S WEBSITE, WWW.RAULTIJERINAJRFOUNDATION.ORG

c

Any submission deadlines

LETTERS OF INQUIRY MUST BE RECEIVED BY APRIL 1. GRANT APPLICATIONS MUST BE RECEIVED BY AUGUST 1

d

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

THE RAUL TIJERINA JR FOUNDATION GRANT APPLICATION GUIDELINES CAN BE FOUND AT THE FOUNDATION'S WEBSITE, WWW.RAULTIJERINAJRFOUNDATION.ORG

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	597,447
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)

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?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received			

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
NA	N/A	N/A

Paid Preparer Use Only	Print/Type preparer's name CHRISTINE SALCH	Preparer's Signature	Date	Check if self-employed <input checked="" type="checkbox"/>	PTIN P00188210
	Firm's name <input checked="" type="checkbox"/> SWANK SALCH & HENDERSON PC			Firm's EIN <input type="checkbox"/>	
	Firm's address <input checked="" type="checkbox"/> 802 N CARANCAHUA SUITE 310 CORPUS CHRISTI, TX 78401			Phone no (713) 654-8111	

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
12,080 511 SHS IVY HIGH INCOME FUND CLASS I	P	2012-01-27	2014-04-29
1,899 846 SHS FROST KEMPNER MULTICAP DEEP VAL EQ	P	2006-07-13	2014-04-29
2,053 271 SHS FROST TOTAL RETURN BOND FUND INSTL	P	2007-06-22	2014-04-29
13,179 194 SHS IVY HIGH INCOME FUND CLASS I	P	2011-06-24	2014-04-29
14,226 037 SHS MAINSTAY CONVERTIBLE FUND I	P	2009-05-01	2014-07-24
361 431 SHS T ROWE PRICE INTERNATIONAL DISCOVERY	P	2009-09-25	2014-04-29
CAPITAL GAIN DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
105,342		98,456	6,886
21,696		19,489	2,207
22,360		20,537	1,823
114,922		110,046	4,876
258,914		159,189	99,725
20,671		13,105	7,566
			527,290


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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			6,886
			2,207
			1,823
			4,876
			99,725
			7,566

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
CARLOS A LOZANO MD	VICE-PRESIDENT/DIRECTOR 3 0	0	0	0
429 BROADVIEW DRIVE WEST SAN ANTONIO,TX 78228				
BORIS A HIDALGO	PRESIDENT/BOARD CHAIR 3 0	0	0	0
333 CLAY STREET SUITE 3300 HOUSTON,TX 77002				
CULLEN R LOONEY	DIRECTOR 3 0	0	0	0
506 E CANTON EDINBURG,TX 78539				
MIKE A HERNANDEZ II	DIRECTOR 3 0	0	0	0
6947 QUARTERWAY DRIVE DALLAS,TX 75248				
JOHN DRAMBERGER	SECRETARY/TREASURER/DIRECTOR 3 0	0	0	0
2108 SOUTHGATE BLVD HOUSTON,TX 77030				


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 Paid during the year				
TEXAS A&M UNIVERSITY PO BOX 30016 COLLEGE STATION,TX 77842	NONE	PC	SCHOLARSHIPS	46,500
BOY & GIRLS CLUB OF RIO GRANDE CITY 1615 E HWY 83 RIO GRANDE CITY,TX 78582	NONE	PC	GENERAL PURPOSE GRANT	20,000
TEXAS STATE UNIVERSITY 607 UNIVERSITY DRIVE SAN MARCOS,TX 78666	NONE	PC	SCHOLARSHIPS	6,000
UNIVERSITY OF TEXAS AT AUSTIN 1 UNIVERSITY STATION AUSTIN,TX 78712	NONE	PC	SCHOLARSHIPS	38,000
UNIVERSITY OF TEXAS PAN AMERICAN 1201 W UNIVERSITY DRIVE EDINBERG,TX 78539	NONE	PC	SCHOLARSHIPS	12,564
GUADALUPE REGIONAL MIDDLE SCHOOL 1214 LINCOLN STREET BROWNSVILLE,TX 78521	NONE	PC	TUITION ASSISTANCE FOR LOW-INCOME CHILDREN	30,000
INCARNATE WORD ACADEMY 2920 SOUTH ALAMEDA CORPUS CHRISTI,TX 78404	NONE	PC	TUITION ASSISTANCE FOR LOW-INCOME CHILDREN	10,000
RIO GRANDE VALLEY BALLET 1025 W JACKSON ST HARLINGEN,TX 78550	NONE	PC	HOLIDAY ARTS PROGRAM FOR LOW-INCOME CHILDREN	6,084
FOOD BANK OF THE RIO GRANDE VALLEY 724 NORTH CAGE BLVD PHARR,TX 78502	NONE	PC	GENERAL PURPOSE GRANT	15,000
TEACH FOR AMERICA 200 S 10TH STREET SUITE 800 MCALLEN,TX 78501	NONE	PC	GENERAL PURPOSE GRANT	20,000
UNIVERSITY OF NORTH TEXAS 1155 UNION CIR DENTON,TX 76203	NONE	PC	SCHOLARSHIP	3,000
UNIVERSITY OF TEXAS AT SAN ANTONIO 1 UTSA CIR SAN ANTONIO,TX 78249	NONE	PC	SCHOLARSHIP	12,000
ABILENE CHRISTIAN UNIVERSITY 1600 CAMPUS CT ABILENE,TX 79601	NONE	PC	SCHOLARSHIPS	3,000
BAYLOR UNIVERSITY 1311 S 5TH ST WACO,TX 76706	NONE	PC	SCHOLARSHIPS	6,000
BOY & GIRLS CLUB OF WESLACO 500 S KANSAS WESLACO,TX 78596	NONE	PC	GENERAL PURPOSE GRANT	20,000
Total  3a				597,447

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>				
THE CAMILLE PLAYHOUSE 1 DEAN PORTER PARK BROWNSVILLE,TX 78520	NONE	PC	GENERAL PURPOSE GRANT	4,260
CHILDREN'S LEARNING INSTITUTE - UT HOUSTON 7000 FANNIN SUITE 2300 HOUSTON,TX 77030	NONE	PC	GENERAL PURPOSE GRANT	25,000
IDEA PUBLIC SCHOOLS 505 ANGELITA DRIVE SUITE 9 WESLACO,TX 78599	NONE	PC	GENERAL PURPOSE GRANT	15,000
LA JOYA INDEPENDENT SCHOOL DISTRICT 200 WEST EXPRESSWAY 83 LA JOYA,TX 78560	NONE	PC	TRANSPORTATION DEPARTMENT FUNDS FOR MULTIPLE ELEMENTARY SCHOOLS, PLAYGROUND EQUIPMENT FOR DIAZ-VILLAREAL ELEMENTARY SCHOOL	40,039
NATIONAL BUTTERFLY CENTER 333 BUTTERFLY PARK DRIVE MISSION,TX 78572	NONE	PC	GENERAL PURPOSE GRANT	15,000
OUR LADY OF GUADALUPE CATHOLIC SCHOOL 400 CALLAGHAN STREET LAREDO,TX 78040	NONE	PC	GENERAL PURPOSE GRANT	20,000
PHARR-SAN JUAN-ALAMO INDEPENDENT SCHOOL DISTRICT 601 E KELLY PHARR,TX 78577	NONE	PC	GENERAL PURPOSE GRANT	15,000
RIO GRANDE VALLEY LIVESTOCK SHOWINC 1000 NORTH TEXAS MERCEDES,TX 78570	NONE	PC	GENERAL PURPOSE GRANT	40,000
ST EDWARD'S UNIVERSITY 3001 S CONGRESS AVE AUSTIN,TX 78704	NONE	PC	SCHOLARSHIPS	6,000
ST MARY'S UNIVERSITY 1 CAMINO SANTA MARIA SAN ANTONIO,TX 78228	NONE	PC	SCHOLARSHIPS	3,000
SAINT JOSEPH ACADEMY 101 SAINT JOSEPH DRIVE BROWNSVILLE,TX 78520	NONE	PC	GENERAL PURPOSE GRANT	10,000
THE TEXAS A&M FOUNDATION 401 GEORGE BUSH DRIVE COLLEGE STATION,TX 77840	NONE	PC	SCHOLARSHIPS	50,000
TEXAS A&M HEALTH SCIENCE CENTER 3950 N AW GRIMES BLVD ROUND ROCK,TX 78665	NONE	PC	SCHOLARSHIPS	50,000
TEXAS A&M UNIVERSITY-KINGSVILLE 955 UNIVERSITY BLVD KINGSVILLE,TX 78363	NONE	PC	SCHOLARSHIPS	3,000
TEXAS CHILDREN'S HOSPITAL 6621 FANNIN ST HOUSTON,TX 77030	NONE	PC	GENERAL PURPOSE GRANT	40,000
Total  3a				597,447

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>				
THE UNIVERSITY OF TEXAS AT BROWNSVILLE 1 W UNIVERSITY BLVD BROWNSVILLE,TX 78520	NONE	PC	SCHOLARSHIPS	3,000
TRANQUIL SOLUTIONS SPECIAL CARE FACILITY 3727 W SCHUNIOR ST EDINBURG,TX 78541	NONE	PC	GENERAL PURPOSE GRANT	10,000
Total  3a				597,447

Sales and Other Dispositions of Capital Assets

▶ **Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.**

▶ **File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.**

Social security number or taxpayer identification number

33-1076963

Part I Short-Term. Transactions involving capital assets you held 1 year or less are short term. For long-term transactions, see page 2.

Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

☐ **(A)** Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ **(B)** Short-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

(C) Short-term transactions not reported to you on Form 1099-B

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

Social security number or taxpayer identification number
33-1076963

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

(F) Long-term transactions not reported to you on Form 1099-B

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

TY 2014 Accounting Fees Schedule**Name:** RAUL TIJERINA JR FOUNDATION

C/O BORIS A HIDALGO

EIN: 33-1076963

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SWANK, SALCH & HENDERSON, P C	3,975	2,981	0	994

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Depreciation Schedule

Name:

RAUL TIJERINA JR FOUNDATION
C/O BORIS A HIDALGO

EIN:

33-1076963

TY 2014 Investments Corporate Bonds Schedule

Name: RAUL TIJERINA JR FOUNDATION
C/O BORIS A HIDALGO

EIN: 33-1076963

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FROST BANK INVESTMENT ACCOUNT	3,748,666	3,747,547

**TY 2014 Investments Corporate
Stock Schedule**

Name: RAUL TIJERINA JR FOUNDATION
C/O BORIS A HIDALGO
EIN: 33-1076963

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FROST BANK INVESTMENT ACCOUNT	6,466,518	7,576,696

TY 2014 Investments - Other Schedule**Name:** RAUL TIJERINA JR FOUNDATION

C/O BORIS A HIDALGO

EIN: 33-1076963

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MINERALS NET OF DEPLETION	AT COST	35,134	111,020

TY 2014 Other Assets Schedule

Name: RAUL TIJERINA JR FOUNDATION

C/O BORIS A HIDALGO

EIN: 33-1076963

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
A/R - ROYALTY PAYMENTS	1,183	100	100
A/R - CAPITAL GAIN DISTR	1,112	0	0
A/R - DIVIDENDS	3,171	16,141	16,141

TY 2014 Other Expenses Schedule

Name: RAUL TIJERINA JR FOUNDATION

C/O BORIS A HIDALGO

EIN: 33-1076963

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
RENT AND ROYALTY EXPENSES		4,255		
BANK FEES	45	45	0	0
DUES	1,725	1,725	0	0
INVESTMENT FEES	14,996	14,996	0	0
D & O INSURANCE	1,200	1,200	0	0
OFFICE EXPENSES	74	74	0	0
Rent and Royalty Expense	4,255			

TY 2014 Other Liabilities Schedule**Name:** RAUL TIJERINA JR FOUNDATION

C/O BORIS A HIDALGO

EIN: 33-1076963

Description	Beginning of Year - Book Value	End of Year - Book Value
A/P - HORTENSIA TIJERINA	228	0

TY 2014 Other Professional Fees Schedule

Name: RAUL TIJERINA JR FOUNDATION

C/O BORIS A HIDALGO

EIN: 33-1076963

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER PROFESSIONAL FEES	34,971	26,228	0	8,743

TY 2014 Taxes Schedule**Name:** RAUL TIJERINA JR FOUNDATION

C/O BORIS A HIDALGO

EIN: 33-1076963

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	20,198	0	0	0
FOREIGN TAXES	5,207	5,207	0	0
PROPERTY TAXES	2,074	2,074	0	0