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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

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

2014

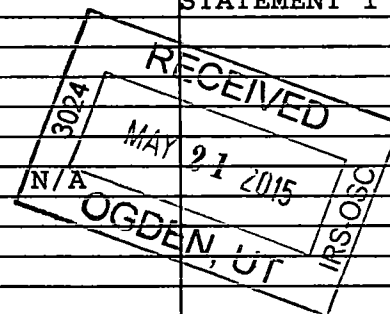
Open to Public Inspection

For calendar year 2014 or tax year beginning

, and ending

Name of foundation EDWARD D & JANET K ROBSON FOUNDATION C/O CINDY BURCHETT		A Employer identification number 73-1589395
Number and street (or P O box number if mail is not delivered to street address) 7136 SOUTH YALE		B Telephone number 208
City or town, state or province, country, and ZIP or foreign postal code TULSA, OK 74136		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <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) \$ 13,845,455.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		214,139.			
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		261,504.	261,504.		
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		1,227,073.			
b Gross sales price for all assets on line 6a		4,304,059.			
7 Capital gain net income (from Part IV, line 2)			1,227,073.		
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)					
11 Other income					
12 Total. Add lines 1 through 11		1,702,716.	1,488,577.	0.	
13 Compensation of officers, directors, trustees, etc		79,934.	63,947.	0.	15,987.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		3,825.	3,060.	0.	765.
c Other professional fees					
17 Interest					
18 Taxes STMT 3		19,983.	7,267.	0.	1,132.
19 Depreciation and depletion		740.	0.	0.	
20 Occupancy		3,000.	2,400.	0.	600.
21 Travel, conferences, and meetings		312.	250.	0.	62.
22 Printing and publications					
23 Other expenses STMT 4		41,674.	33,357.	0.	8,317.
24 Total operating and administrative expenses. Add lines 13 through 23		149,468.	110,281.	0.	26,863.
25 Contributions, gifts, grants paid		570,854.			570,854.
26 Total expenses and disbursements. Add lines 24 and 25		720,322.	110,281.	0.	597,717.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		982,394.			
b Net investment income (if negative, enter -0-)			1,378,296.		
c Adjusted net income (if negative, enter -0-)				0.	

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LHA For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	122,085.	282,130.	282,130.	
	2 Savings and temporary cash investments	23,619.	34,128.	34,128.	
	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				
	7 Other notes and loans receivable ▶				
	Less: allowance for doubtful accounts ▶				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock STMT 6	7,665,258.	8,468,800.	10,147,489.	
	c Investments - corporate bonds				
	Assets	11 Investments - land, buildings, and equipment: basis ▶ 77,518.			
Less accumulated depreciation ▶ 12,357.		24,927.	65,161.	65,161.	
12 Investments - mortgage loans					
13 Investments - other STMT 7		3,299,585.	3,296,890.	3,316,547.	
14 Land, buildings, and equipment: basis ▶					
Less accumulated depreciation ▶					
15 Other assets (describe ▶)					
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		11,135,474.	12,147,109.	13,845,455.	
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				
	22 Other liabilities (describe ▶)				
23 Total liabilities (add lines 17 through 22)	0.	0.			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>				
	27 Capital stock, trust principal, or current funds	0.	0.		
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
	29 Retained earnings, accumulated income, endowment, or other funds	11,135,474.	12,147,109.		
30 Total net assets or fund balances	11,135,474.	12,147,109.			
31 Total liabilities and net assets/fund balances	11,135,474.	12,147,109.			

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	11,135,474.
2 Enter amount from Part I, line 27a	2	982,394.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 5	3	32,834.
4 Add lines 1, 2, and 3	4	12,150,702.
5 Decreases not included in line 2 (itemize) ▶ NON DEDUCTIBLE EXPENSES	5	3,593.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	12,147,109.

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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 ATTACHMENT A - BANCFIRST	P	VARIOUS	12/31/14
b SEE ATTACHMENT A - BANCFIRST	P	VARIOUS	12/31/14
c CAPITAL GAINS DIVIDENDS			
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 552,653.		559,905.	<7,252.>
b 3,263,946.		2,517,081.	746,865.
c 487,460.			487,460.
d			
e			

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			<7,252.>
b			746,865.
c			487,460.
d			
e			

2 Capital gain net income or (net capital loss)	2	1,227,073.
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). If (loss), enter -0- in Part I, line 8	3	<7,252.>

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))
2013	536,776.	12,125,423.	.044269
2012	551,152.	11,112,511.	.049597
2011	499,290.	11,107,414.	.044951
2010	234,326.	10,102,295.	.023195
2009	148,298.	7,020,880.	.021122

2 Total of line 1, column (d)	2	.183134
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	.036627
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	13,232,762.
5 Multiply line 4 by line 3	5	484,676.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	13,783.
7 Add lines 5 and 6	7	498,459.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	597,717.

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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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	13,783.
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	0.
3 Add lines 1 and 2		3	13,783.
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	13,783.
6 Credits/Payments:			
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	10,120.	
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	10,120.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	3,663.	
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 2015 estimated tax <input type="checkbox"/> Refunded <input checked="" type="checkbox"/>	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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 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.		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		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?	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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> OK		
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	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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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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		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? Website address N/A	13	X	
14	The books are in care of CINDY BURCHETT Located at SAME AS RETURN	Telephone no. 918-496-8166 ZIP+4 		
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	
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? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country 	16	Yes	No
				X

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)? Organizations relying on a current notice regarding disaster assistance check here N/A		1b
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
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? If "Yes," list the years 	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.) N/A		2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 		
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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.) N/A		3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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
		X

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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)? ☐ Yes ☒ No

Organizations relying on a current notice regarding disaster assistance check here ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ 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? ☐ Yes ☒ 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? ☐ Yes ☒ No

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
EDWARD D. & JANET K. ROBSON 7136 SOUTH YALE, SUITE 208 TULSA, OK 74136	TRUSTEES 0.00	0.	0.	0.
CINDY BURCHETT 7136 SOUTH YALE, SUITE 208 TULSA, OK 74136	DIRECTOR AND TRUSTEE 40.00	79,934.	0.	0.

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

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

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

0

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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. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	13,269,983.
b	Average of monthly cash balances	1b	164,293.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	13,434,276.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	13,434,276.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	201,514.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,232,762.
6	Minimum investment return. Enter 5% of line 5	6	661,638.

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	661,638.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	13,783.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	13,783.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	647,855.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	647,855.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	647,855.

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	597,717.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	597,717.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	13,783.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	583,934.

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.

Form 990-PF (2014)

EDWARD D & JANET K ROBSON FOUNDATION
C/O CINDY BURCHETT

Form 990-PF (2014)

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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				647,855.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			568,936.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2014:				
a From 2009				
b From 2010				
c From 2011				
d From 2012				
e From 2013				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2014 from Part XII, line 4: ▶ \$ 597,717.				
a Applied to 2013, but not more than line 2a			568,936.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2014 distributable amount				28,781.
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		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				619,074.
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)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	0.			
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				

N/A

- b** Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

- 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(i)(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).)

SEE STATEMENT 8

- 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:

EDWARD D. AND JANET K. ROBSON FOUNDATION, C/O CINDY BURCHETT
7136 SOUTH YALE, STE 208, TULSA, OK 74136

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

A WRITTEN REQUEST SHOULD BE SUBMITTED TO THE ADDRESS ABOVE.

- c Any submission deadlines:**

THERE ARE NO SUBMISSION DEADLINES.

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

THE ORGANIZATION MUST BE A U.S. ENTITY ORGANIZED & OPERATED UNDER I.R.C. SECTION 501(C)(3) AND 170(C)(2).

EDWARD D & JANET K ROBSON FOUNDATION
C/O CINDY BURCHETT

Form 990-PF (2014)

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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				
HOBE SOUND COMMUNITY CHEST, INC. P.O. BOX 511 HOBE SOUND, FL 33455		PUBLIC CHARITY	GENERAL OPERATING FUND	10,000.
JUPITER MEDICAL CENTER FOUNDATION 1210 S. OLD DIXIE HIGHWAY JUPITER, FL 33458		PUBLIC CHARITY	DA VINCI SURGICAL ROBOT	150,000.
NOWATA PUBLIC SCHOOLS 707 W. OSAGE NOWATA, OK 74048		PUBLIC CHARITY	VARIOUS GRANTS	317,354.
SAFENET SERVICES P.O. BOX 446 CLAREMORE, OK 74018		PUBLIC CHARITY	OPERATING FUND - MAYES COUNTY OFFICE	43,000.
HOBE SOUND NATURE CENTER P.O. BOX 217 HOBE SOUND, FL 33475		PUBLIC CHARITY	GENERAL OPERATING FUND	500.
Total	SEE CONTINUATION SHEET(S)			570,854.
b Approved for future payment				
NONE				
Total				0.

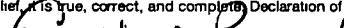

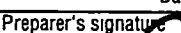
Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | <p>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?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>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.</p> | <table border="1"> <tr> <th></th><th>Yes</th><th>No</th></tr> <tr> <td>1a(1)</td><td></td><td>X</td></tr> <tr> <td>1a(2)</td><td></td><td>X</td></tr> <tr> <td>1b(1)</td><td></td><td>X</td></tr> <tr> <td>1b(2)</td><td></td><td>X</td></tr> <tr> <td>1b(3)</td><td></td><td>X</td></tr> <tr> <td>1b(4)</td><td></td><td>X</td></tr> <tr> <td>1b(5)</td><td></td><td>X</td></tr> <tr> <td>1b(6)</td><td></td><td>X</td></tr> <tr> <td>1c</td><td></td><td>X</td></tr> </table> | | Yes | No | 1a(1) | | X | 1a(2) | | X | 1b(1) | | X | 1b(2) | | X | 1b(3) | | X | 1b(4) | | X | 1b(5) | | X | 1b(6) | | X | 1c | | X |
|--|---|----|-----|----|-------|--|---|-------|--|---|-------|--|---|-------|--|---|-------|--|---|-------|--|---|-------|--|---|-------|--|---|----|--|---|
| | Yes | No | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1a(1) | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1a(2) | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1b(1) | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1b(2) | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1b(3) | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1b(4) | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1b(5) | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1b(6) | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1c | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

[illegible]

- 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
N/A		

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.				May the IRS discuss this return with the preparer shown below (see instr. 7)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
	 Signature of officer or trustee		05/13/15 Date		 Title		
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature		Date	Check <input type="checkbox"/> if self-employed	PTIN
	W. MARK LEWELLEN				5/13/15	<input type="checkbox"/>	P00360508
	Firm's name ▶ DELOITTE TAX LLP					Firm's EIN ▶ 86-1065772	
	Firm's address ▶ 100 S. CINCINNATI, SUITE 700 TULSA, OK 74103					Phone no. 918-477-8800	

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Name of the organization

EDWARD D & JANET K ROBSON FOUNDATION
C/O CINDY BURCHETT

Employer identification number

73-1589395

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

Name of organization EDWARD D & JANET K ROBSON FOUNDATION C/O CINDY BURCHETT	Employer identification number 73-1589395
--	--

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ED AND JANET ROBSON 7136 SOUTH YALE, SUITE 208 TULSA, OK 74136	\$ 125,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	ED AND JANET ROBSON 7136 SOUTH YALE, SUITE 208 TULSA, OK 74136	\$ 89,139.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer Identification number

73-1589395

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	1,976 SHS CLOVIS ONCOLOGY INC. 6,876 SHS HOMEAWAY INC. 2,097 SHS KYTHERA BIOPHARMACEUTICALS INC.	\$ 89,139.	05/08/14
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Employer identification number

73-1589395

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) **\$** _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
AMERICAN BEACON L/C VALUE FUND	52,457.	39,363.	13,094.	13,094.	0.
BAIRD INTERMEDIATE BOND FUND INST CAUSEWAY	26,603.	1,552.	25,051.	25,051.	0.
INTERNATIONAL VALUE INSTL	15,250.	0.	15,250.	15,250.	0.
DODGE & COX STOCK FUND #145	27,311.	12,903.	14,408.	14,408.	0.
DODGE & COX STOCK FUND #147	36,781.	7,489.	29,292.	29,292.	0.
FEDERATED CLOVER SMALL VALUE-IS	130,753.	122,249.	8,504.	8,504.	0.
GOLDMAN SACHS FINANCIAL SQUARE	6.	0.	6.	6.	0.
GOLDMAN SACHS STRATEGIC INCOME FUND	8,299.	0.	8,299.	8,299.	0.
JOHN HANCOCK RAINIER GROWTH EQUITY	194,617.	194,617.	0.	0.	0.
LAZARD EMERGING MARKETS	19,494.	8,688.	10,806.	10,806.	0.
MFS RESEARCH INTERNATIONAL FUND #899	9,632.	0.	9,632.	9,632.	0.
NORTHERN SMALL CAP VALUE FUND	43,574.	29,871.	13,703.	13,703.	0.
NUVEEN WINSLOW LARGE - CAP GROWTH	65,829.	65,829.	0.	0.	0.
PIMCO LOW DURATION INST	11,978.	0.	11,978.	11,978.	0.
PIMCO TOTAL RETURN INST	29,453.	4,899.	24,554.	24,554.	0.
VANGUARD 500 INDEX FUND - SIGNAL CLASS	14,163.	0.	14,163.	14,163.	0.
VANGUARD 500 INDEX FUND ADMIRAL SHARES #540	45,306.	0.	45,306.	45,306.	0.
VANGUARD GROWTH INDEX ADMIRAL SHARES FUND #509	8,423.	0.	8,423.	8,423.	0.
VANGUARD SMALL CAP VALUE INDEX	9,035.	0.	9,035.	9,035.	0.
TO PART I, LINE 4	748,964.	487,460.	261,504.	261,504.	0.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREP FEES	3,825.	3,060.	0.	765.
TO FORM 990-PF, PG 1, LN 16B	3,825.	3,060.	0.	765.

FORM 990-PF	TAXES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	5,166.	4,133.	0.	1,033.
FOREIGN TAX	3,134.	3,134.	0.	0.
TANGIBLE PROPERTY TAX	99.	0.	0.	99.
EXCISE TAX	11,584.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	19,983.	7,267.	0.	1,132.

FORM 990-PF	OTHER EXPENSES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MONTHLY INVESTMENT FEES	36,710.	29,386.	0.	7,324.
TELEPHONE	1,107.	886.	0.	221.
COMPUTER EXPENSES	86.	69.	0.	17.
50% OF MEALS	90.	72.	0.	18.
OFFICE SUPPLIES	599.	479.	0.	120.
AUTO EXPENSES	618.	494.	0.	124.
MEMBERSHIP DUES	500.	400.	0.	100.
SUBSCRIPTIONS	1,964.	1,571.	0.	393.
TO FORM 990-PF, PG 1, LN 23	41,674.	33,357.	0.	8,317.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	5
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DESCRIPTION	AMOUNT
NON CASH COMPENSATION INCLUDED IN LINE 13	7,998.
DIVIDEND INCOME REPORTED IN 2013	24,836.
TOTAL TO FORM 990-PF, PART III, LINE 3	32,834.

FORM 990-PF	CORPORATE STOCK	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	8,468,800.	10,147,489.
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,468,800.	10,147,489.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OTHER INVESTMENTS	FMV	3,296,890.	3,316,547.
TOTAL TO FORM 990-PF, PART II, LINE 13		3,296,890.	3,316,547.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	8
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NAME OF MANAGER

EDWARD D. & JANET K. ROBSON
CINDY BURCHETT

ACCT M06T 600020010
FROM 01/01/2014
TO 12/31/2014

STATEMENT OF CAPITAL GAINS AND LOSSES
ED AND JANET ROBSON FOUNDATION IMA

PAGE 43

RUN 02/13/2015
04:26:52 PM

TRUST YEAR ENDING 12/31/2014

TAX PREPARER: 1
TRUST ADMINISTRATOR: MMC
INVESTMENT OFFICER: BLZ

LEGEND F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	MARKET DISCOUNT	TERM	NC
42593 6630 MCKEE INTERNATIONAL EQUITY INST - 00758M188 - MINOR = 470								
SOLD		07/21/2014	598440.96					
ACQ	13333 4640	02/15/2011	187335.17	168134.96	19200.21	0 00	LT	Y
	10342.0200	03/10/2011	145305.38	127000.00	18305.38	0 00	LT	Y
	31 9740	03/24/2011	449.23	400.00	49.23	0 00	LT	Y
	6895.7350	07/26/2011	96885.08	87300.00	9585.08	0 00	LT	Y
	1526 0320	08/17/2011	21440.75	17000.00	4440.75	0 00	LT	Y
	974 2120	10/19/2011	13687.68	10200.00	3487.68	0 00	LT	Y
	198 2550	07/25/2013	2785.48	2500.00	285.48	0 00	ST	
	9291.9710	05/01/2014	130552.19	127300.00	3252.19	0 00	ST	
94 0550 AMERICAN BEACON L/C VALUE FUND - 02368A208 - MINOR = 466								
SOLD		05/01/2014	2800.00					
ACQ	94.0550	06/12/2008	2800.00	1987.38	812.62	0 00	LT	Y
243 6680 AMERICAN BEACON L/C VALUE FUND - 02368A208 - MINOR = 466								
SOLD		07/15/2014	7600.00					
ACQ	243 6680	06/12/2008	7600.00	5148.70	2451.30	0 00	LT	Y
12 8700 AMERICAN BEACON L/C VALUE FUND - 02368A208 - MINOR = 466								
SOLD		08/20/2014	400.00					
ACQ	12 8700	06/12/2008	400.00	271.94	128.06	0 00	LT	Y
143.3120 AMERICAN BEACON L/C VALUE FUND - 02368A208 - MINOR = 466								
SOLD		09/08/2014	4500.00					
ACQ	143.3120	06/12/2008	4500.00	3028.18	1471.82	0 00	LT	Y
2938.0060 BAIRD INTERMEDIATE BOND FUND INST - 057071805 - MINOR = 441								
SOLD		05/01/2014	32700.00					
ACQ	1339 2070	07/25/2012	14905.37	15200.00	-294.63	0 00	LT	
	1598.7990	04/03/2013	17794.63	18114.39	-319.76	0 00	LT	
1533.6320 BAIRD INTERMEDIATE BOND FUND INST - 057071805 - MINOR = 441								
SOLD		07/15/2014	17100.00					
ACQ	1533.6320	04/03/2013	17100.00	17376.05	-276.05	0 00	LT-W	
787 1200 BAIRD INTERMEDIATE BOND FUND INST - 057071805 - MINOR = 441								
SOLD		08/20/2014	8800.00					
ACQ	787 1200	04/03/2013	8800.00	8918.07	-118.07	0 00	LT	
780.2690 BAIRD INTERMEDIATE BOND FUND INST - 057071805 - MINOR = 441								
SOLD		09/08/2014	8700.00					
ACQ	780.2690	04/03/2013	8700.00	8840.45	-140.45	0 00	LT	
3410.5020 WILLIAM BLAIR SMALL CAP VALUE-I - 093001824 - MINOR = 468								
SOLD		05/01/2014	60400.00					
ACQ	3410.5020	07/26/2011	60400.00	48633.76	11766.24	0 00	LT	Y
121 3460 WILLIAM BLAIR SMALL CAP VALUE-I - 093001824 - MINOR = 468								
SOLD		07/15/2014	2200.00					
ACQ	121.3460	07/26/2011	2200.00	1730.39	469.61	0 00	LT	Y
43601.8580 WILLIAM BLAIR SMALL CAP VALUE-I - 093001824 - MINOR = 468								
SOLD		09/09/2014	785269.46					
ACQ	34008.9910	07/26/2011	612501.93	484968.21	127533.72	0 00	LT	Y
	226 3360	12/20/2012	4076.31	3141.54	934.77	0 00	LT	
	3846 1540	08/17/2011	69269.23	47000.00	22269.23	0 00	LT	Y
	2274 7630	12/16/2011	40968.48	27183.42	13785.06	0 00	LT	Y
	2356 4140	12/20/2013	42439.02	41237.25	1201.77	0 00	ST	
	889 2000	12/20/2013	16014.49	15560.94	453.55	0 00	ST	
1976.0000 CLOVIS ONCOLOGY INC - 189464100 - MINOR = 50								
SOLD		06/26/2014	83062.48					
ACQ	39.0000	11/09/2009	1639.39	339.30	1300.09	0 00	LT	Y
	85.0000	11/09/2009	3573.03	739.50	2833.53	0 00	LT	Y
	489 0000	11/18/2009	20555.44	6552.60	14002.84	0 00	LT	Y
	1072 0000	11/18/2009	45062.24	14364.80	30697.44	0 00	LT	Y
	91.0000	05/24/2011	3825.25	1183.00	2642.25	0 00	LT	
	200.0000	05/24/2011	8407.13	2600.00	5807.13	0 00	LT	
3612.7170 DODGE & COX INCOME FUND #147 - 256210105 - MINOR = 441								
SOLD		05/01/2014	50000.00					
ACQ	3612 7170	04/03/2013	50000.00	50036.13	-36.13	0 00	LT	
1261.7160 DODGE & COX INCOME FUND #147 - 256210105 - MINOR = 441								
SOLD		07/15/2014	17500.01					
ACQ	6.5210	07/26/2011	90.45	87.84	2.61	0 00	LT	Y
	811.5940	07/25/2012	11256.81	11200.00	56.81	0 00	LT	
	443.6010	04/03/2013	6152.75	6143.87	8.88	0 00	LT	
754.3100 DODGE & COX INCOME FUND #147 - 256210105 - MINOR = 441								
SOLD		08/20/2014	10500.00					
ACQ	754.3100	07/26/2013	10500.00	10220.90	279.10	0 00	LT	
825.5560 DODGE & COX INCOME FUND #147 - 256210105 - MINOR = 441								
SOLD		09/08/2014	11500.00					
ACQ	825 5560	07/26/2013	11500.00	11186.28	313.72	0 00	LT	
148.5030 DODGE & COX STOCK FUND #145 - 256219106 - MINOR = 466								
SOLD		05/01/2014	25400.00					
ACQ	27.0260	01/06/2011	4622.54	2968.54	1654.00	0 00	LT	Y
	121.4770	03/24/2011	20777.46	13750.00	7027.46	0 00	LT	Y
53 4760 DODGE & COX STOCK FUND #145 - 256219106 - MINOR = 466								
SOLD		07/15/2014	9600.00					
ACQ	53.4760	01/06/2011	9600.00	5873.81	3726.19	0 00	LT	Y
36 1050 DODGE & COX STOCK FUND #145 - 256219106 - MINOR = 466								
SOLD		08/20/2014	6500.00					
ACQ	36.1050	01/06/2011	6500.00	3965.78	2534.22	0 00	LT	Y
60.0630 DODGE & COX STOCK FUND #145 - 256219106 - MINOR = 466								
SOLD		09/08/2014	11000.00					
ACQ	60.0630	01/06/2011	11000.00	6597.33	4402.67	0 00	LT	Y

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TRUST YEAR ENDING 12/31/2014

TAX PREPARER: 1
TRUST ADMINISTRATOR MMC
INVESTMENT OFFICER BLZ

LEGEND: F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	MARKET DISCOUNT	TERM	NC
3667 6760 FEDERATED CLOVER SMALL VALUE-IS - 314172263 - MINOR = 468								
SOLD		05/01/2014	96900.00					
ACQ	3667.6760	07/26/2011	96900.00	79441.86	17458.14	0.00	LT	Y
0000 GOLDMAN SACHS FINANCIAL SQUARE #520 - 38142B880 - MINOR = 325								
SOLD		03/24/2014	50000.00					
ACQ	.0000		50000.00	50000.00	0.00	0.00	LT	Y
0000 GOLDMAN SACHS FINANCIAL SQUARE #520 - 38142B880 - MINOR = 325								
SOLD		05/08/2014	150000.00					
ACQ	.0000		150000.00	150000.00	0.00	0.00	LT	Y
849.8580 GOLDMAN SACHS STRG INCOME FUND INSTL - 38145C646 - MINOR = 592								
SOLD		05/01/2014	9000.00					
ACQ	849.8580	04/03/2013	9000.00	8898.01	101.99	0.00	LT	
264 6510 GOLDMAN SACHS STRG INCOME FUND INSTL - 38145C646 - MINOR = 592								
SOLD		07/15/2014	2800.00					
ACQ	264.6510	04/03/2013	2800.00	2770.90	29.10	0.00	LT	
94.6970 GOLDMAN SACHS STRG INCOME FUND INSTL - 38145C646 - MINOR = 592								
SOLD		08/20/2014	1000.00					
ACQ	94.6970	07/25/2013	1000.00	997.16	2.84	0.00	LT	
377.3580 GOLDMAN SACHS STRG INCOME FUND INSTL - 38145C646 - MINOR = 592								
SOLD		09/08/2014	4000.00					
ACQ	377.3580	07/25/2013	4000.00	3973.58	26.42	0.00	LT	
6876 0000 HOMEAWAY INC - 43739Q100 - MINOR = 50								
SOLD		06/26/2014	236930.94					
ACQ	115.0000	01/01/1910	3962.63	1.00	3961.63	0.00	LT	Y
	809.0000	05/22/2000	27876.25	2915.00	24961.25	0.00	LT	Y
	241.0000	05/22/2000	8304.30	6.00	8298.30	0.00	LT	Y
	189.0000	05/26/2006	6512.50	22.68	6489.82	0.00	LT	Y
	791.0000	11/02/2006	27256.02	3955.00	23301.02	0.00	LT	Y
	990.0000	11/02/2006	34113.09	4950.00	29163.09	0.00	LT	Y
	627.0000	01/05/2007	21604.96	3135.00	18469.96	0.00	LT	Y
	151.0000	01/07/2007	5203.11	755.00	4448.11	0.00	LT	Y
	388.0000	02/16/2007	13369.58	537.00	12832.58	0.00	LT	Y
	115.0000	02/16/2007	3962.63	1.00	3961.63	0.00	LT	Y
	388.0000	02/16/2007	13369.58	4.00	13365.58	0.00	LT	Y
	115.0000	02/16/2007	3962.63	1.00	3961.63	0.00	LT	Y
	388.0000	02/16/2007	13369.58	4.00	13365.58	0.00	LT	Y
	155.0000	10/23/2008	5340.94	2531.82	2809.12	0.00	LT	Y
	1212.0000	11/18/2008	41762.69	19798.34	21964.35	0.00	LT	Y
	202.0000	12/29/2008	6960.45	3298.66	3661.79	0.00	LT	Y
276.9540 JOHN HANCOCK SELECT GROWTH FUND CLASS I - 47803U699 - MINOR = 460								
SOLD		05/01/2014	5600.00					
ACQ	276.9540	03/24/2011	5600.00	5868.65	-268.65	0.00	LT-W	Y
42791 3930 JOHN HANCOCK SELECT GROWTH FUND CLASS I - 47803U699 - MINOR = 460								
SOLD		05/28/2014	876795.64					
ACQ	26989.1920	10/20/2009	553008.54	461245.30	91763.24	0.00	LT	Y
	107.6620	03/24/2011	2205.99	2281.35	-75.36	0.00	LT	Y
	2568.0530	08/17/2011	52619.41	50000.00	2619.41	0.00	LT	Y
	670.1630	12/17/2013	13731.64	17779.20	-4047.56	0.00	ST	
	2797.9270	12/17/2013	57329.52	74228.96	-16899.44	0.00	ST	
	7023.9540	04/17/2014	143920.82	141532.60	2388.22	0.00	ST	
	2634.4420	04/17/2014	53979.72	53084.06	895.66	0.00	ST	
2097 0000 KYTHERA BIOPHARMACEUTICALS I - 501570105 - MINOR = 50								
SOLD		06/26/2014	79998.98					
ACQ	16.0000	06/08/2004	610.39	34.24	576.15	0.00	LT	Y
	264.0000	06/08/2004	10071.40	564.96	9506.44	0.00	LT	Y
	1.0000	02/18/2005	38.15	0.53	37.62	0.00	LT	Y
	53.0000	02/18/2005	2021.91	28.09	1993.82	0.00	LT	Y
	3.0000	08/19/2005	114.45	1.56	112.89	0.00	LT	Y
	225.0000	08/19/2005	8583.58	117.00	8466.58	0.00	LT	Y
	229.0000	05/16/2008	8736.18	3057.15	5679.03	0.00	LT	Y
	457.0000	05/16/2008	17434.21	6100.95	11333.26	0.00	LT	Y
	159.0000	07/02/2009	6065.73	2122.65	3943.08	0.00	LT	Y
	316.0000	07/02/2009	12055.16	4218.60	7836.56	0.00	LT	Y
	130.0000	08/29/2011	4959.40	1807.00	3152.40	0.00	LT	
	244.0000	08/29/2011	9308.42	3391.60	5916.82	0.00	LT	
724.0040 LAZARD EMERGING MARKETS EQUITY FUND CLASS INSTITUTIONAL - 52106N889 - MINOR = 471								
SOLD		07/08/2014	14900.00					
ACQ	446.6020	03/10/2011	9191.07	9200.00	-8.93	0.00	LT	Y
	126.7750	08/17/2011	2609.03	2500.00	109.03	0.00	LT	Y
	150.6270	04/03/2013	3099.90	2887.52	212.38	0.00	LT	
436.0470 LAZARD EMERGING MARKETS EQUITY FUND CLASS INSTITUTIONAL - 52106N889 - MINOR = 471								
SOLD		07/15/2014	9000.00					
ACQ	436.0470	04/03/2013	9000.00	8359.02	640.98	0.00	LT	
473.6590 LAZARD EMERGING MARKETS EQUITY FUND CLASS INSTITUTIONAL - 52106N889 - MINOR = 471								
SOLD		08/20/2014	9800.00					
ACQ	473.6590	04/03/2013	9800.00	9080.04	719.96	0.00	LT	
100.6710 LAZARD EMERGING MARKETS EQUITY FUND CLASS INSTITUTIONAL - 52106N889 - MINOR = 471								
SOLD		09/08/2014	2100.00					
ACQ	100.6710	04/03/2013	2100.00	1929.86	170.14	0.00	LT	
74.4280 MFS RESEARCH INTERNATIONAL FUND #899 - 552983470 - MINOR = 470								
SOLD		07/15/2014	1400.00					
ACQ	74.4280	06/12/2008	1400.00	1386.59	13.41	0.00	LT	Y
375.3350 MFS RESEARCH INTERNATIONAL FUND #899 - 552983470 - MINOR = 470								
SOLD		08/20/2014	7000.00					
ACQ	375.3350	06/12/2008	7000.00	6992.49	7.51	0.00	LT	Y

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TRUST YEAR ENDING 12/31/2014

TAX PREPARER: 1
TRUST ADMINISTRATOR: MMC
INVESTMENT OFFICER: BLZ

LEGEND: F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	MARKET DISCOUNT	TERM	NC
916.9890 PIMCO LOW DURATION INSTITUTIONAL - 693390304 - MINOR = 592								
SOLD		05/01/2014	9500.00					
ACQ	567.6440	07/25/2012	5880.79	6000.00	-119.21	0.00	LT	
	29.8190	12/12/2012	308.92	314.29	-5.37	0.00	LT	
	141.0030	12/12/2012	1460.79	1486.17	-25.38	0.00	LT	
	178.5230	04/03/2013	1849.50	1876.28	-26.78	0.00	LT	
492.2780 PIMCO LOW DURATION INSTITUTIONAL - 693390304 - MINOR = 592								
SOLD		07/15/2014	5100.00					
ACQ	492.2780	04/03/2013	5100.00	5173.84	-73.84	0.00	LT-W	
154.5890 PIMCO LOW DURATION INSTITUTIONAL - 693390304 - MINOR = 592								
SOLD		08/20/2014	1600.00					
ACQ	154.5890	04/03/2013	1600.00	1624.73	-24.73	0.00	LT	
319.1490 PIMCO LOW DURATION INSTITUTIONAL - 693390304 - MINOR = 592								
SOLD		09/08/2014	3300.00					
ACQ	319.1490	04/03/2013	3300.00	3354.26	-54.26	0.00	LT	
1924.4940 PIMCO TOTAL RETURN INSTL - 693390700 - MINOR = 592								
SOLD		05/01/2014	20900.01					
ACQ	917.7880	10/20/2009	9967.18	10031.42	-64.24	0.00	LT	Y
	426.1360	12/12/2012	4627.84	4840.91	-213.07	0.00	LT	
	580.5700	12/12/2012	6304.99	6595.27	-290.28	0.00	LT	
1052.1500 PIMCO TOTAL RETURN INSTL - 693390700 - MINOR = 592								
SOLD		07/15/2014	11500.00					
ACQ	1052.1500	10/20/2009	11500.00	11500.00	0.00	0.00	LT	Y
537.8300 PIMCO TOTAL RETURN INSTL - 693390700 - MINOR = 592								
SOLD		08/20/2014	5900.00					
ACQ	537.8300	10/20/2009	5900.00	5878.48	21.52	0.00	LT	Y
447.4890 PIMCO TOTAL RETURN INSTL - 693390700 - MINOR = 592								
SOLD		09/08/2014	4900.00					
ACQ	447.4890	10/20/2009	4900.00	4891.05	8.95	0.00	LT	Y
38.1000 VANGUARD SMALL-CAP VALUE INDEX ADMIRAL - 921937686 - MINOR = 468								
SOLD		07/15/2014	1700.00					
ACQ	38.1000	04/03/2013	1700.00	1306.62	393.38	0.00	LT	
78.0550 VANGUARD SMALL-CAP VALUE INDEX ADMIRAL - 921937686 - MINOR = 468								
SOLD		08/20/2014	3500.00					
ACQ	78.0550	04/03/2013	3500.00	2676.87	823.13	0.00	LT	
41.8320 VANGUARD SMALL-CAP VALUE INDEX ADMIRAL - 921937686 - MINOR = 468								
SOLD		09/08/2014	1900.00					
ACQ	41.8320	04/03/2013	1900.00	1434.61	465.39	0.00	LT	
389.5090 VANGUARD GROWTH INDEX ADMIRAL SHARES FUND #509 - 922908660 - MINOR = 460								
SOLD		07/15/2014	19900.00					
ACQ	389.5090	05/29/2014	19900.00	19409.23	490.77	0.00	ST	
480.3070 VANGUARD GROWTH INDEX ADMIRAL SHARES FUND #509 - 922908660 - MINOR = 460								
SOLD		08/20/2014	25000.00					
ACQ	480.3070	05/29/2014	25000.00	23933.70	1066.30	0.00	ST	
869.7260 VANGUARD GROWTH INDEX ADMIRAL SHARES FUND #509 - 922908660 - MINOR = 460								
SOLD		11/21/2014	47000.00					
ACQ	869.7260	05/29/2014	47000.00	43338.45	3661.55	0.00	ST	
1325.0520 VANGUARD 500 INDEX FUND ADMIRAL SHARES #540 - 922908710 - MINOR = 463								
SOLD		05/01/2014	230400.00					
ACQ	1325.0520	04/03/2013	230400.00	189765.40	40634.60	0.00	LT	
243.7280 VANGUARD 500 INDEX FUND ADMIRAL SHARES #540 - 922908710 - MINOR = 463								
SOLD		07/15/2014	44400.00					
ACQ	243.7280	04/03/2013	44400.00	34905.15	9494.85	0.00	LT	
165.9500 VANGUARD 500 INDEX FUND ADMIRAL SHARES #540 - 922908710 - MINOR = 463								
SOLD		08/20/2014	30500.00					
ACQ	165.9500	04/03/2013	30500.00	23766.29	6733.71	0.00	LT	
72.2880 VANGUARD 500 INDEX FUND ADMIRAL SHARES #540 - 922908710 - MINOR = 463								
SOLD		09/08/2014	13400.00					
ACQ	72.2880	04/03/2013	13400.00	10352.62	3047.38	0.00	LT	
130.9040 VANGUARD 500 INDEX FUND ADMIRAL SHARES #540 - 922908710 - MINOR = 463								
SOLD		11/21/2014	25000.00					
ACQ	130.9040	04/03/2013	25000.00	18747.23	6252.77	0.00	LT	
TOTALS			3816598.48	3076985.16				

SUMMARY OF CAPITAL GAINS/LOSSES

FEDERAL	SHORT TERM	LONG TERM 28%	LONG TERM	ST WASH SALE	LT WASH SALE	1250 GAIN
NONCOVERED FROM ABOVE	0.00	0.00	660290.59	0.00	-268.65	0.00*
COVERED FROM ABOVE	-7251.51	0.00	87192.78	0.00	-349.89	
COMMON TRUST FUND	0.00	0.00	0.00			0.00
CAPITAL GAIN DIV/DIST	93519.48	0.00	393913.06			27.25
	86267.97	0.00	1141396.43	0.00	-618.54	27.25

73-1589395

3 Grants and Contributions Paid During the Year (Continuation)

423631
05-01-14