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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
Mary Potishman Lard Trust
Walker Friedman, Co-Trustee

A Employer identification number: 75-6210697

Number and street (or P O box number if mail is not delivered to street address): 604 East 4th Street, Suite 200
Room/suite:

B Telephone number (see instructions): 817-334-0144

City or town, state or province, country, and ZIP or foreign postal code: Fort Worth TX 76102

C If exemption application is pending, check here ▶ ☐

D 1 Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

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

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 35,881,326

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

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

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			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☒ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	58	58		
	4	Dividends and interest from securities	373,836	373,836		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10 Stmt 1	820,093			
	b	Gross sales price for all assets on line 6a 2,113,018				
	7	Capital gain net income (from Part IV, line 2)		820,093		
	8	Net short-term capital gain			0	
	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) Stmt 2	2,142,575	2,142,575		
	12	**Total.** Add lines 1 through 11	3,336,562	3,336,562	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	54,000	40,500		13,500
	14	Other employee salaries and wages	7,751			7,751
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule) See Stmt 3	262	262		
	b	Accounting fees (attach schedule) Stmt 4	4,530	4,530		
	c	Other professional fees (attach schedule) Stmt 5	166,850	166,850		
	17	Interest				
	18	Taxes (attach schedule) (see instructions) Stmt 6	125,190	125,190		
	19	Depreciation (attach schedule) and depletion Stmt 7	299			
	20	Occupancy	13,978			13,978
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (att sch) Stmt 8	9,479	8,215		1,264
	24	**Total operating and administrative expenses.** Add lines 13 through 23	382,339	345,547	0	36,493
	25	Contributions, gifts, grants paid	1,472,500			1,472,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,854,839	345,547	0	1,508,993
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	1,481,723			
	b	**Net investment income** (if negative, enter -0-)		2,991,015		
	c	**Adjusted net income** (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

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Form **990-PF** (2014)

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash – non-interest-bearing	21,401	1,105,523	1,105,523
	2	Savings and temporary cash investments	2,686,533	665,969	665,969
	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 (att schedule) ▶			
		Less allowance for doubtful accounts ▶ 0			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments – U S and state government obligations (attach schedule)			
	b	Investments – corporate stock (attach schedule) See Stmt 9	10,196,617	10,586,128	18,048,985
	c	Investments – corporate bonds (attach schedule) See Stmt 10	1,714,112	1,832,668	1,910,612
	11	Investments – land, buildings, and equipment basis ▶ 43,824			
		Less accumulated depreciation (attach sch) ▶ Stmt 11 38,305	5,818	5,519	5,519
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule) See Statement 12	2,000,000	3,837,397	7,229,183
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶ See Statement 13)			6,915,535
	16	**Total assets** (to be completed by all filers – see the instructions Also, see page 1, item I)	16,624,481	18,033,204	35,881,326
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	15,159,299	16,391,788	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	1,465,182	1,641,416	
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see instructions)	16,624,481	18,033,204	
	31	**Total liabilities and net assets/fund balances** (see instructions)	16,624,481	18,033,204	

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	16,624,481
2	Enter amount from Part I, line 27a	2	1,481,723
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	18,106,204
5	Decreases not included in line 2 (itemize) ▶ See Statement 14	5	73,000
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	18,033,204

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	Publicly Traded Securities			
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	2,113,018		1,292,925	820,093
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(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				
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** 820,093

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 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	1,279,532	31,665,178	0.040408
2012	1,219,315	26,576,817	0.045879
2011	917,009	24,487,700	0.037448
2010	752,545	19,309,727	0.038972
2009	919,782	15,753,018	0.058388

2	Total of line 1, column (d)	2	0.221095
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	0.044219
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	34,900,944
5	Multiply line 4 by line 3	5	1,543,285
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	29,910
7	Add lines 5 and 6	7	1,573,195
8	Enter qualifying distributions from Part XII, line 4	8	1,508,993

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter **(attach copy of letter if necessary—see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b			1	59,820
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	59,820
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	59,820
6	Credits/Payments				
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	75,608		
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	75,608
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	15,788
11	Enter the amount of line 10 to be **Credited to 2015 estimated tax** ▶ 15,788 **Refunded** ▶			11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? 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	1b		X
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ____ **(2)** On foundation managers ▶ $ ____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ TX			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities (continued)

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

Website address ▶ N/A

14 The books are in care of ▶ Walker C. Friedman Telephone no ▶ 817-334-0144

604 East 4th Street, Suite 200

Located at ▶ Fort Worth TX ZIP+4 ▶ 76102

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

			Yes	No
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		X
	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 ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

				Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? **(Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1b		X
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?	☐ Yes ☒ No			
	If "Yes," list the years ▶ 20 , 20 , 20 , 20				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement – see instructions)	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 ▶ 20 , 20 , 20 , 20				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?		4b		X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(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)? N/A **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? N/A ☐ 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: X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A **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
Walker C Friedman 604 East 4th Street, Suite 200	Fort Worth TX 76102	Co-Trustee 0.00	27,000	0	0
Alan D Friedman 4211 Versailles	Dallas TX 75205	Co-Trustee 0.00	27,000	0	0

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

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

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."

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

Part IX-A Summary of Direct Charitable Activities

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

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
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	25,641,567
b	Average of monthly cash balances	1b	2,869,809
c	Fair market value of all other assets (see instructions)	1c	6,921,054
d	**Total** (add lines 1a, b, and c)	1d	35,432,430
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	35,432,430
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions)	4	531,486
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	34,900,944
6	**Minimum investment return.** Enter 5% of line 5	6	1,745,047

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	1,745,047
2a	Tax on investment income for 2014 from Part VI, line 5	2a	59,820		
b	Income tax for 2014 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	59,820
3	Distributable amount before adjustments Subtract line 2c from line 1			3	1,685,227
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	1,685,227
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	1,685,227

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	1,508,993
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,508,993
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,508,993

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					1,685,227
2	Undistributed income, if any, as of the end of 2014					
a	Enter amount for 2013 only				1,465,182	
b	Total for prior years 20_____ , 20_____ , 20_____					
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					
4	Qualifying distributions for 2014 from Part XII, line 4: ▶ $ 1,508,993					
a	Applied to 2013, but not more than line 2a				1,465,182	
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					43,811
e	Remaining amount distributed out of corpus					
5	Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a))					
6	**Enter the net total of each column as indicated below:**					
a	Corpus. Add lines 3f, 4c, and 4e Subtract line 5					
b	Prior years' undistributed income Subtract line 4b from line 2b					
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed					
d	Subtract line 6c from line 6b Taxable amount – see instructions					
e	Undistributed income for 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					1,641,416
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					
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					

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon a "Assets" alternative test – enter (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test – enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year – see instructions.)

1 Information Regarding Foundation Managers:

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

N/A

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

N/A

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

Walker C Friedman 817-334-0144
604 East 4th Street, Suite 200 Fort Worth TX 76102

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

Name of Organization, Purpose, Location, Reason and Amount

c Any submission deadlines

None

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

None

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED SCHEDULE				
			PROGRAM SUPPORT	1,472,500
Total			▶ 3a	1,472,500
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue.					
a			18		
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	58	
4 Dividends and interest from securities			14	373,836	
5 Net rental income or (loss) from real estate·					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			15	2,142,575	
8 Gain or (loss) from sales of assets other than inventory			18	820,093	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		3,336,562	0

13 Total. Add line 12, columns (b), (d), and (e) 13 3,336,562

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
N/A	

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

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

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

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

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 instructions)? ☑ Yes ☐ No

▶ , TRUSTEE | 11/16/15 ▶ TRUSTEE

Signature of officer or trustee | Date | Title

Paid Preparer Use Only

Print/Type preparer's name Beverly Howl	Preparer's signature Beverly Howl, CPA Beverly Howl	Date 11/16/15	Check ☒ if self-employed
Firm's name ▶ Beverly Howl, CPA		PTIN P01604093	
Firm's address ▶ 5747 Cedar Creek Drive Fort Worth, TX 76109		Firm's EIN ▶ 45-6964185 Phone no	

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Description			How Received				
Whom Sold	Date Acquired	Date Sold	Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
			Purchase $ 2,113,018	$ 1,292,925	$	$	$ 820,093
Total			$ 2,113,018	$ 1,292,925	$ 0	$ 0	$ 820,093

Statement 2 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
Oil and Gas Revenue	$ 2,305,178	$ 2,305,178	$
Blackgold Opportunity Fund LP	-162,603	-162,603	
Total	$ 2,142,575	$ 2,142,575	$ 0

Statement 3 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Legal Fees	$ 262	$ 262	$	$
Total	$ 262	$ 262	$ 0	$ 0

Statement 4 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Tax Preparation Fee	$ 2,600	$ 2,600	$	$
Oil and Gas Accounting Fees	1,930	1,930		
Total	$ 4,530	$ 4,530	$ 0	$ 0

Statement 5 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Investment Fees	$ 166,850	$ 166,850	$	$
Total	$ 166,850	$ 166,850	$ 0	$ 0

Statement 6 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Gross Production Tax	$ 105,923	$ 105,923	$	$
Ad Valorem Tax	17,300	17,300		
Foreign Tax	1,967	1,967		
Total	$ 125,190	$ 125,190	$ 0	$ 0

Statement 7 - Form 990-PF, Part I, Line 19 - Depreciation

Description							
Date Acquired	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
Furniture							
1/01/93	$ 5,166	$ 5,166	Straight Line	5	$	$	$
Relocation Costs							
1/01/94	11,648	5,830	Straight Line	39	299		

Statement 7 - Form 990-PF, Part I, Line 19 - Depreciation (continued)

Description							
Date Acquired	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
File Cabinet							
4/01/87	$ 608	$ 608	Straight Line	5	$	$	$
Supply Cabinet							
1/01/87	187	187	Straight Line	5			
Office Furnishings							
1/01/87	20,393	20,393	Straight Line	5			
Art Work							
4/01/88	5,822	5,822	Straight Line	5			
Total	$ 43,824	$ 38,006			$ 299	$ 0	$ 0

Statement 8 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
Expenses				
Other Royalty Expenses	7,818	7,818		
Office Supplies	1,264			1,264
Interest Expense	397	397		
Total	$ 9,479	$ 8,215	$ 0	$ 1,264

Statement 9 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Corporate Stock - See Attached	$ 10,196,617	$ 10,586,128		$ 18,048,985
Total	$ 10,196,617	$ 10,586,128		$ 18,048,985

Statement 10 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Corporate Bonds - See Attached	$ 1,714,112	$ 1,832,668		$ 1,910,612
Total	$ 1,714,112	$ 1,832,668		$ 1,910,612

Statement 11 - Form 990-PF, Part II, Line 11 - Land, Building, and Equipment Investments

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
Office Equipment	$ 5,818	$ 43,824	$ 38,305	$ 5,519
Total	$ 5,818	$ 43,824	$ 38,305	$ 5,519

Statement 12 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Double Black Diamond Ltd	$ 2,000,000	$ 2,000,000	Cost	$ 5,391,786
BlackGold Opportunity Fund LP		1,837,397	Cost	1,837,397
Total	$ 2,000,000	$ 3,837,397		$ 7,229,183

Statement 13 - Form 990-PF, Part II, Line 15 - Other Assets

Description	Beginning of Year	End of Year	Fair Market Value
Mineral Assets	$	$	$ 6,915,535
Total	$ 0	$ 0	$ 6,915,535

Statement 14 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
Excise Tax	$ 73,000
Total	$ 73,000

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
Name of Organization, Purpose, Location, Reason and Amount

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
None

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
None

Mary Potishman Lard Trust
75-6210697
12/31/2014

Statement 9 - Corporate Stock Detail

Description	Quantity	Cost	Fair Market Value
Held in JPMorgan Acct #W03389009			
Abbott Laboratories	2,500.000	22,242.44	112,550.00
Abbvie Inc.	2,500.000	24,120.02	163,600.00
Air Products & Chemicals Inc	1,500.000	50,493.75	216,345.00
Allergan Inc	1,000.000	59,815.00	212,590.00
Amgen Inc	1,500.000	87,129.50	238,935.00
Apache Corp	1,800.000	135,043.61	112,806.00
Archer Daniels Midland Co	5,000.000	141,988.68	260,000.00
AT&T Inc	2,000.000	94,457.50	67,180.00
Atmos Energy Corp	4,000.000	114,290.10	222,960.00
Automatic Data Processing Inc	3,000.000	101,474.72	250,110.00
Cerner Corp	4,000.000	40,070.00	258,640.00
Chubb Corp	3,400 000	107,311.00	351,798.00
Cisco Systems Inc	8,000.000	119,026.60	222,520.00
ConocoPhillips	1,803.000	36,853.96	124,515.18
Cullen Frost Bankers Inc	2,800.000	82,181.00	197,792.00
Dover Corp	1,700.000	91,299.12	121,924.00
Emerson Electric Co	4,000.000	122,265.50	246,920.00
Express Scripts Holding	2,000.000	109,943.00	169,340.00
Exxon Mobil Corp	2,640.000	66,321.74	244,068.00
Halliburton Co	4,000.000	112,563.40	157,320.00
Halyard Health Inc	250.000	4,866.48	11,367.50
International Business Machines Corp	1,100.000	112,710.00	176,484.00
Johnson & Johnson	2,500.000	126,756.76	261,425.00
JPMorgan Chase & Co	3,000.000	136,215.00	187,740.00
Kimberly-Clark Corp	2,000.000	112,335.77	231,080.00
Medtronic Inc	4,000.000	101,120.00	288,800.00
Microsoft Corp	5,500.000	156,863.75	255,475.00
Nucor Corp	3,000.000	135,204.60	147,150.00
Pepsico Inc	2,500.000	78,432.29	236,400.00
Procter & Gamble Co	1,950.000	92,575.00	177,625.50
Sigma Aldrich Corp	1,500.000	24,871.87	205,905.00
Sonoco Products Co	4,000.000	97,621.25	174,800.00
T Rowe Price Group Inc	3,500.000	63,490.62	300,510.00
Target Corp	2,500.000	92,167.50	189,775.00
Texas Instruments Inc	5,000.000	127,966.50	267,325.00
United Parcel Service Inc	2,000.000	134,404.95	222,340.00
Verizon Communications Inc	2,000.000	71,380.38	93,560.00
Whole Foods Market Inc	3,000.000	115,704.60	151,260.00
Xcel Energy Inc	4,500.000	99,506.50	161,640.00
Tortoise Energy Infrastructure	2,500.000	66,466.45	109,425.00

Mary Potishman Lard Trust
75-6210697
12/31/2014

Statement 9 - Corporate Stock Detail

Description	Quantity	Cost	Fair Market Value
ABM Industries Inc	7,000.000	86,709.40	200,550.00
Anheuser Busch Inbev SA/NV	2,000.000	114,419.80	224,640.00
Rio Tinto PLC	2,000.000	92,927.00	92,120.00
Royal Dutch Shell PLC	2,000.000	103,695.00	133,900.00
Thornburg Intl Value FD-1	8,102.884	200,000.00	222,100.05
Check Point Software Technologies	1,500.000	96,440.10	117,855.00
Plum Creek Timber Company Inc	3,000.000	76,908.56	128,370.00
Weingarten Realty Investors	5,000.000	110,981.70	174,600.00
Held in JPMorgan Acct #W03390007			
Abbott Laboratories	1,250.000	31,494.21	56,275.00
Abbvie Inc	1,250.000	34,152.79	81,800.00
ACI Worldwide Inc	6,450.000	115,734.29	130,096.50
Akamai Technologies Inc	2,425.000	57,563.22	152,678.00
Akorn Inc	3,750.000	132,217.50	135,750.00
Amazon Com Inc	375.000	64,146.32	116,381.25
American Express Co	1,525.000	116,020.17	141,886.00
Ametek Inc	2,418.000	41,983.56	127,259.34
Apple Inc	1,225.000	43,360.94	135,215.50
B/E Aerospace Inc	1,525.000	113,809.23	88,480.50
Cabot Oil & Gas Corp	4,200.000	75,831.00	124,362.00
Celgene Corporation	1,950.000	79,495.55	218,127.00
Cinemark Holdings Inc	3,400.000	61,030.00	120,972.00
Citrix Systems Inc	1,900.000	123,228.49	121,220.00
Coca-Cola Co	1,900.000	72,510.95	80,218.00
Comerica Inc	2,825.000	80,594.99	132,323.00
Danaher Corp	1,300.000	35,026.50	111,423.00
Dover Corp	1,425.000	112,571.54	102,201.00
Dril-quip Inc	1,150.000	53,815.40	88,239.50
El Du Pont De Nemours & Co	1,550.000	67,750.50	114,607.00
EMC Corp Mass	3,375.000	49,999.42	100,372.50
Ebay Inc	1,900.000	112,005.00	106,628.00
EOG Resources Inc	1,500.000	74,843.83	138,105.00
FMC Corp	1,650.000	63,317.60	94,099.50
FS Networks Inc	750.000	66,792.75	97,848.75
Google Inc Class C	125.000	31,932.36	65,800.00
Google Inc Class A	125.000	32,034.71	66,332.50
Gulfport Energy Corporation	2,075.000	62,663.76	86,610.50
Johnson & Johnson	1,175.000	74,376.56	122,869.75
JPMorgan Chase & Co	1,850.000	80,290.00	115,773.00
Kimberly-Clark Corp	975.000	63,943.23	112,651.50

Mary Potishman Lard Trust
75-6210697
12/31/2014

Statement 9 - Corporate Stock Detail

Description	Quantity	Cost	Fair Market Value
Kirby Co	1,150.000	43,193.91	92,851.00
KLX Inc	762.000	0.00	31,432.50
Knowles Corp	587.000	18,235.51	13,823.85
Kraft Foods Group Inc	616.000	23,757.88	38,598.56
LKQ Corporation	2,750.000	14,533.61	77,330.00
Merck and Co Inc	2,125.000	111,731.44	120,678.75
Mondelez International W/I	1,850.000	43,947.70	67,201.25
Monsanto Co	1,000.000	50,259.70	119,470.00
Moodys Corp	1,350.000	126,114.17	129,343.50
National Instruments Corp	3,612.000	67,869.78	112,297.08
Nuance Communications Inc	5,775.000	30,836.42	82,409.25
O Reilly Automotive Inc New	950.000	30,463.24	182,989.00
Pall Corp	1,575.000	78,860.25	159,405.75
Penske Automotive Group Inc	3,125.000	47,477.81	153,343.75
Pepsico Inc	1,275.000	81,026.12	120,564.00
Perkinelmer Inc	2,900.000	115,043.00	126,817.00
Procter & Gamble Co	975.000	70,450.16	88,812.75
Prudential Financial Inc	1,475.000	76,222.40	133,428.50
Qualcomm Inc	1,575.000	109,213.85	117,069.75
Range Resources Corp	1,375.000	38,984.45	73,493.75
Rockwell Automation Inc	1,100.000	98,371.02	122,320.00
Roper Industries Inc	700.000	57,306.71	109,445.00
Sabre Corp	6,650.000	129,788.05	134,795.50
SBA Communications Corp	1,550.000	24,691.78	171,678.00
Suntrust Banks Inc	3,250.000	89,049.68	136,175.00
Thermo Fisher Scientific Inc	1,325.000	41,154.50	166,009.25
Tiffany & Co	1,375.000	82,115.00	146,932.50
Trimble Navigation Ltd	3,250.000	67,047.50	86,255.00
V F Corp	2,300.000	112,236.35	172,270.00
Walt Disney World	1,350.000	121,944.83	127,156.50
Wells Fargo & Co	2,575.000	72,947.43	141,161.50
Zions Bancorp	3,675.000	112,109.55	104,774.25
Held in JPMorgan Acct #W03391005			
Applied Materials Inc	2,000.000	88,500.00	49,840.00
JPMorgan Chase & Co	1,452.000	34,475.00	90,866.16
Held in The Private Bank of Texas #15-0888-01-4			
Crystal Capital - Mpl Tr	15,000.000	1,500,000.00	1,665,206.29
		10,586,127.64	18,048,985.76

Mary Potishman Lard Trust
75-6210697
12/31/2014

Statement 10 - Corporate Bond Detail

Description	Quantity	Cost	Fair Market Value
Held in JPMorgan Acct #W03389009			
HSBC Finance Corporation	100,000.000	98,154.00	101,331.00
Metlife Inc	100,000.000	100,750.00	102,001.00
Pimco Fd Pac Inv Mgmt Series	21,208.910	200,000.00	193,849.42
Caterpillar Fin Serv Corporation	100,000.000	97,710.00	105,727.00
Amgen Inc	100,000.000	101,992.00	112,561.00
ConocoPhillips	100,000.000	99,206.00	114,008.00
AT&T Inc	100,000.000	108,560.00	113,696.00
Shell International Fin	100,000.000	102,697.00	109,143.00
JPMorgan Chase & Co	150,000.000	162,048.58	163,569.00
General Elec Cap Corp	100,000.000	98,489.00	111,393.00
Hewlett Packard Co	100,000.000	104,344.00	104,386.00
Total Capital SA	150,000.000	159,684.00	163,861.50
Toyota Motor Credit Corp	100,000.000	100,175.00	104,211.00
Chevron Corp	150,000.000	144,991.50	154,059.00
IBM Corp	150,000.000	153,867.32	156,816.00
		1,832,668.40	1,910,611.92

MARY POTISHMAN LARD TRUST
CONTRIBUTIONS MADE TO DATE FOR DISTRIBUTION IN 2014
(as of 11/16/2015)

Organization	Address	City	State	Zip	Contribution	Date Agreed	Date Paid
Alliance for Children	908 Southland Avenue	Fort Worth	TX	76104	$20,000.00	12/9/2014	12/11/2014
All Saints Health Foundation	1400 8th Avenue	Fort Worth	TX	76104	$35,000.00	6/4/2014	6/12/2014
American Cancer Society	3301 West Freeway	Fort Worth	TX	76107	$10,000.00	12/9/2014	12/11/2014
American Heart Association	105 Decker Court, Suite 200	Irving	TX	75062	$5,000.00	1/14/2014	1/16/2014
American Heart Association	2630 West Freeway, Suite 250	Fort Worth	TX	76102	$10,000.00	4/24/2014	4/24/2014
American Heart Association	2630 West Freeway, Suite 250	Fort Worth	TX	76102	$10,000.00	12/9/2014	12/11/2014
American Red Cross	1551 Sylvania Avenue	Fort Worth	TX	76111	$5,000.00	6/4/2014	6/12/2014
Amon Carter Museum of American Art	3501 Camp Bowie Blvd.	Fort Worth	TX	76107	$75,000.00	12/9/2014	12/11/2014
Arlington Heights High School - Art Department	4501 West Freeway	Fort Worth	TX	76107	$15,000.00	11/3/2014	11/4/2014
Austin Street Centre	P. O. Box 1710729	Dallas	TX	75371	$10,000.00	9/29/2014	10/2/2014
Ballet Concerto	3083 Camp Bowie Blvd.	Fort Worth	TX	76107	$5,000.00	9/29/2014	10/2/2014
Bass Hall Endowment	330 East 4th Street, Suite 300	Fort Worth	TX	76102	$100,000.00	9/29/2014	10/2/2014
Baylor Health Care System	3500 Gaston Avenue	Dallas	TX	75246	$25,000.00	12/9/2014	12/11/2014
Bobby Bragan Youth Foundation	3116 West 6th Street, Suite 200	Fort Worth	TX	76107	$2,500.00	12/9/2014	12/11/2014
Booker T Washington High School for the Performing and Visual Arts (Advisory Board of BTWHSPVA)	P O. Box 192648	Dallas	TX	75219	$5,000.00	12/9/2014	12/11/2014
Boys & Girls Clubs of Greater Fort Worth	3218 East Belknap Street	Fort Worth	TX	76111	$5,000.00	9/29/2014	10/2/2014
Boy Scouts of America Longhorn Council (2014 Distinguished Citizen Award)	P O Box 54190	Hurst	TX	76054	$5,000.00	9/29/2014	10/2/2014
Breakthrough Fort Worth	4200 Country Day Lane	Fort Worth	TX	76109	$5,000.00	6/4/2014	6/12/2014
The Brookwood Community	1752 FM 1489	Brookshire	TX	77423	$10,000.00	11/3/2014	11/4/2014
Camp Fire USA	2700 Meacham Blvd.	Fort Worth	TX	76137	$5,000.00	9/29/2014	10/2/2014
Camp John Marc	2824 Swiss Avenue	Dallas	TX	75204	$5,000.00	5/5/2014	5/5/2014
Cancer Care Services	623 South Henderson Street	Fort Worth	TX	76104	$3,000 00	9/29/2014	10/2/2014
Casa Manana	3101 West Lancaster Avenue	Fort Worth	TX	76107	$10,000 00	12/9/2014	12/11/2014
CASA of Tarrant County	101 Summit Avenue, Suite 505	Fort Worth	TX	76102	$5,000.00	6/4/2014	6/12/2014
Chamber Music Society of Fort Worth	2501 Parkview Drive, Suite 317E	Fort Worth	TX	76102	$5,000.00	9/17/2013	9/18/2013
Child Study Center	1300 West Lancaster Avenue	Fort Worth	TX	76102	$3,000.00	3/10/2014	3/13/2014
Child Study Center	1300 West Lancaster Avenue	Fort Worth	TX	76102	$25,000.00	12/9/2014	12/11/2014
Cistercian School	3660 Cistercian Road	Irving	TX	75039	$10,000.00	12/9/2014	12/11/2014
Clayton Dabney for Kids with Cancer	6500 Greenville Avenue, Suite 342	Dallas	TX	75206	$2,000 00	3/10/2014	3/13/2014
The Cliburn	2525 Ridgmar Blvd., Suite 307	Fort Worth	TX	76116	$15,000.00	12/9/2014	12/11/2014

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CONTRIBUTIONS MADE TO DATE FOR DISTRIBUTION IN 2014
(as of 11/16/2015)

Organization	Address	City	State	Zip	Contribution	Date Agreed	Date Paid	
Cornerstone Assistance Network	3500 Noble Avenue	Fort Worth	TX	76111	$40,000 00	12/9/2014	12/11/2014	
Crystal Charity Ball	3838 Oak Lawn Avenue, Suite L150	Dallas	TX	75219	$3,000.00	3/10/2014	3/13/2014	
Cystic Fibrosis Foundation	3840 Hulen Street, Suite 600	Fort Worth	TX	76107	$5,000 00	9/29/2014	10/2/2014	
Day Resource Center	1415 East Lancaster	Fort Worth	TX	76012	$10,000.00	6/4/2014	6/12/2014	
Educational First Steps	2100 Circle Drive, Suite 300	Fort Worth	TX	76119	$10,000.00	9/29/2014	10/2/2014	
Focus on Teens	3131 McKinney Avenue, Suite 600	Dallas	TX	75204	$10,000.00	12/9/2014	12/11/2014	
Fort Worth Academy	7301 Dutch Branch Road	Fort Worth	TX	76132	$5,000.00	3/10/2014	3/13/2014	
Fort Worth Classic Guitar Society	1300 Gendy Street	Fort Worth	TX	76107	$3,000.00	6/4/2014	6/12/2014	
Fort Worth Country Day School	4200 Country Day Lane	Fort Worth	TX	76109	$100,000.00	12/9/2014	12/11/2014	2 & 3 of 3
Fort Worth Opera	1300 Gentry Street	Fort Worth	TX	76107	$5,000.00	3/10/2014	3/13/2014	
Fort Worth Public Library Foundation	500 West Third Street	Fort Worth	TX	76102	$10,000 00	12/9/2014	12/11/2014	
Fort Worth Sister Cities	610 Grove Street	Fort Worth	TX	76102	$5,000.00	3/10/2014	3/13/2014	
Fort Worth Symphony Orchestra	330 East 4th Street, Suite 200	Fort Worth	TX	76102	$100,000.00	12/9/2014	12/11/2014	
Fort Worth Youth Orchestra	4401 Trail Lake Drive	Fort Worth	TX	76109	$10,000.00	12/9/2014	12/11/2014	
Gill Children's Services	555 Hemphill Street, Suite 200	Fort Worth	TX	76104	$25,000.00	9/29/2014	10/2/2014	
Hill School	4817 Odessa Avenue	Fort Worth	TX	76133	$25,000.00	12/9/2014	12/11/2014	
(HS)^2	1493 County Road 106	Carbondale	CO	81623	$20,000.00	3/10/2014	3/13/2014	
Imagination Celebration Fort Worth	1300 Gendy Street, Suite 210	Fort Worth	TX	76107	$5,000 00	3/10/2014	3/13/2014	
Imagination Celebration Fort Worth	1300 Gendy Street, Suite 210	Fort Worth	TX	76107	$5,000.00	12/9/2014	12/11/2014	
Jewel Charity	5020 Collinwood Avenue, Suite 400	Fort Worth	TX	76107	$25,000 00	6/4/2014	6/12/2014	
Jubilee Theatre	506 Main Street	Fort Worth	TX	76102	$5,000 00	9/29/2014	10/1/2014	
Junior Achievement of the Chisholm Trail, Inc	6300 Ridglea Place, Suite 400	Fort Worth	TX	76116	$2,500.00	3/10/2014	3/13/2014	
Kappa Kappa Gamma Foundation, Inc.	3524 Centenary Avenue	Dallas	TX	75225	$2,500 00	6/4/2014	6/12/2014	
KERA	3000 Hary Hines Boulevard	Dallas	TX	75201	$10,000 00	6/4/2014	6/12/2014	
Key School	3947 E. Loop 830 S	Fort Worth	TX	76119	$10,000.00	12/9/2014	12/11/2014	
Kimball Art Museum	3333 Camp Bowie Blvd.	Fort Worth	TX	76107	$20,000.00	9/29/2014	10/2/2014	
Learning Center of North Texas	101 Summit Avenue, Suite 612	Fort Worth	TX	76102	$10,000 00	12/9/2014	12/11/2014	
Meals on Wheels of Tarrant County, Inc	320 South Freeway	Fort Worth	TX	76104	$10,000.00	12/9/2014	12/11/2014	
Methodist Justice Ministry	750 West Fifth Street	Fort Worth	TX	76102	$5,000.00	3/10/2014	3/13/2014	
Methodist Justice Ministry	750 West Fifth Street	Fort Worth	TX	76102	$5,000.00	12/9/2014	12/11/2014	
Multicultural Alliance	500 W. 7th St., Suite 1707, Unit 15	Fort Worth	TX	76102	$5,000.00	3/10/2014	3/13/2014	
National Math + Science Initiative	8350 N. Central Expwy, Ste M-2200	Dallas	TX	75206	$60,000 00	5/12/2014	5/27/2014	
National Museum of Women in the Arts	1250 New York Avenue, NW	Washington	DC	20005	$5,000.00	9/29/2014	10/2/2014	1 of 3
North Central Texas Academy	3846 North Highway 144	Granbury	TX	76048	$5,000.00	9/29/2014	10/2/2014	

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CONTRIBUTIONS MADE TO DATE FOR DISTRIBUTION IN 2014

(as of 11/16/2015)

Organization	Address	City	State	Zip	Contribution	Date Agreed	Date Paid	
Old Jail Art Center	201 South 2nd Street	Albany	TX	76430	$5,000.00	9/29/2014	10/2/2014	
Parenting Center	2928 West Fifth Street	Fort Worth	TX	76107	$5,000.00	3/10/2014	3/13/2014	
Park Cities YMCA	6000 Preston Road	Dallas	TX	75205	$2,500.00	12/9/2014	12/11/2014	
Performing Arts Fort Worth, Inc.	330 East 4th Street, Suite 300	Fort Worth	TX	76102	$10,000.00	3/10/2014	3/13/2014	
Ronald McDonald House of Fort Worth	1001 8th Avenue	Fort Worth	TX	76104	$10,000.00	6/4/2014	6/12/2014	
Salesmanship Club	106 E. 10th Street, Suite 200	Dallas	TX	75203	$35,000.00	12/9/2014	12/11/2014	
Salvation Army - Mabee Center	8787 N Stemmons Fwy , Suite 800	Dallas	TX	75247	$25,000.00	9/29/2014	10/2/2014	
Score A Goal in the Classroom	575 Diamond Bar Trail	Aledo	TX	76008	$10,000.00	6/4/2014	6/12/2014	
Shriners Hospitals for Children	P. O. Box 1320	Fort Worth	TX	76101	$5,000.00	6/4/2014	6/12/2014	
Shriners Hospitals for Children	P. O. Box 1320	Fort Worth	TX	76101	$5,000.00	12/9/2014	12/11/2014	
Sons of the Flag	8750 N Central Expwy., Suite 510	Dallas	TX	75231	$10,000.00	9/29/2014	10/2/2014	
Southwestern Medical Foundation	3963 Maple Avenue, Suite 100	Dallas	TX	75219	$25,000.00	12/9/2014	12/11/2014	
St. Philip's School and Community Center	1600 Pennsylvania Avenue	Dallas	TX	75215	$5,000.00	9/29/2014	10/2/2014	
Streams & Valleys	2918 Wingate Street	Fort Worth	TX	76107	$1,000.00	9/29/2014	10/2/2014	
Tarrant Area Food Bank	2600 Cullen Street	Fort Worth	TX	76107	$100,000.00	12/9/2014	12/11/2014	
Teach for America	600 N. Pearl Street, Suite 2300	Dallas	TX	75201	$50,000.00	12/9/2014	12/11/2014	1 of 2
Texas Ballet Theatre	1540 Mall Circle	Fort Worth	TX	76116	$15,000.00	12/9/2014	12/11/2014	
Texas Christian University (Cornelia & Bayard Friedman Tennis Scholarship)	2800 S. University Drive	Fort Worth	TX	76129	$100,000.00	12/9/2014	12/11/2014	
Texas Philosophical Society	P.O. Box 160144	Austin	TX	78716	$5,000.00	1/17/2014	1/17/2014	
Texas Wildlife Association Foundation	3660 Thousand Oaks, Suite 126	San Antonio	TX	78247	$10,000.00	3/10/2014	3/13/2014	
United Way of Tarrant County	P. O. Box 4448	Fort Worth	TX	76164	$5,000.00	3/10/2014	3/13/2014	
United Way of Tarrant County	P O Box 4448	Fort Worth	TX	76164	-$10,000.00			Void
Van Zandt Cottage Friends, Inc.	P O. Box 470742	Fort Worth	TX	76147	$20,000.00	12/9/2014	12/11/2014	
The WARM Place	809 Lipscomb Street	Fort Worth	TX	76104	$2,500.00	6/4/2014	6/12/2014	
	TOTAL CONTRIBUTIONS 2014				$1,472,500.00			