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Form 990-PF

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

OMB No 1545-0052 2014

Department of the Treasury Internal Revenue Service

Do Not effect Social Security Horno Its Septimental Revenue Service

Information about Form 990-PF and its Septimental Revenue Service

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For calendar year 2014, or tax year beginning 2014, and ending Employer identification number THE SHERMAN FOUNDATION 91-2136222 Number and street (or P O box number if mail is not delivered to street address) Room/suite В Telephone number (see instructions) 7502 SHADYVILLA LN

City or town, state or province, country, and ZIP or foreign postal code (281) 556-5628 C If exemption application is pending, check here. HOUSTON 77055 Initial return of a former public charity Check all that apply Initial return 1 Foreign organizations, check here Amended return Final return 2 Foreign organizations meeting the 85% test, check Address change Name change here and attach computation Section 501(c)(3) exempt private foundation Check type of organization: If private foundation status was terminated X Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation Ε under section 507(b)(1)(A), check here . . Fair market value of all assets at end of year Accounting method Accrual (from Part II, column (c), line 16) Other (specify) If the foundation is in a 60-month termination **►** \$ (Part I, column (d) must be on cash basis) under section 507(b)(1)(B), check here . 11,096,545. Part | Analysis of Revenue and (a) Revenue and (b) Net investment (d) Disbursements (c) Adjusted net Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) for charitable expenses per books income income purposes (cash basis only) (see instructions)) Will for Contributions, qifts, grants etc, received (attach schedule) . X if the foundris not required to attach Sch B Interest on savings and temporary cash investments . . Dividends and interest from securities 17,578. 17,578 5 a Gross rents . . . b Net rental income or (loss) 6 a Net gain or (loss) from sale of assets not on line 10 REVERU b Gross sales price for all assets on line 6a · · · 28 Capital gain net income (from Part IV, line 2) Net short-term capital gain . د المجابطة صو ٠ Income modifications 1.78.45.51 10 a Gross sales less returns and allowances . . b Less Cost of goods sold . . . c Gross profit or (loss) (attach schedule) 11 Other income (attach schedule) 1,964,689 See Line 11 Stmt 982,267. 17,606 Total Add lines 1 through 11. 13 Compensation of officers, directors, trustees, etc . SCANNED NOV I 5° 2015 14 Other employee salaries and wages Pension plans, employee benefits. . 15 16 a Legal fees (attach schedule) nung fees (attach sch) L. L. L. L. Stmt 3,225 c Other prof fees (attach sch) 17 Intere Taxes (attach schedule)(see instrs) 18 Depreciation (attach 19 sch) and depletion 20 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses (attach schedule) MISCELLANEOUS 376. 24 Total operating and administrative expenses Add lines 13 through 23 . 3,601 236,939. 25 Contributions, gifts, grants paid . . . 47 . 236,939. 26 Total expenses and disbursements. Add lines 24 and 25 240,540 236,939 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements 741 b Net investment income (if negative, enter -0-). C Adjusted net income (if negative, enter -0-) . .

Form **990-RF** (2014)

Dart	Tip I	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	
r _e di'l	, 1 A	(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash – non-interest-bearing	5,390.	7,000.	7,000.
	2	Savings and temporary cash investments	320,212.	337,667.	387,151.
	3	Accounts receivable	<u> </u>		
		Less: allowance for doubtful accounts			
	4	Pledges receivable	344-74-34		
		Less allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach sch)		Will Cold States Co.	
A		Less: allowance for doubtful accounts			
S	8	Inventories for sale or use			
A S S E T	9	Prepaid expenses and deferred charges			
s	10 a	Investments — U.S. and state government obligations (attach schedule)			
	b	Investments — corporate stock (attach schedule)			
		: Investments — corporate bonds (attach schedule)			
	11	Investments — land, buildings, and equipment basis		美国的 地名	拉斯克斯维斯
		Less. accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans			
	13	Investments — other (attach schedule) L-13. Stmt	66,844,673.	68,567,363.	10,700,000.
	14	Land, buildings, and equipment, basis			alkanan ya
		Less accumulated depreciation (attach schedule)	After (family costs of family constitution). At the process and the constitution of the costs th	2000 - 20	hallethadicion talanamica and talana
	15 16	Other assets (describe Prepaid Tax) Total assets (to be completed by all filers —	2,648.	2,394.	2,394.
		see the instructions Also, see page 1, item I).	67,172,923.	68,914,424.	11,096,545.
L	17	Accounts payable and accrued expenses			
Ä	18	Grants payable			
В	19	Deferred revenue			
Ŀ	20	Loans from officers, directors, trustees, & other disqualified persons			
I T	21	Mortgages and other notes payable (attach schedule)			
i	22	Other liabilities (describe			
S S	23	Total liabilities (add lines 17 through 22)			
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
N F E U	24	Unrestricted			
TN	25	Temporarily restricted			
, D	26	Permanently restricted			
A S S A E T A		Foundations that do not follow SFAS 117, check here \cdot \triangleright \times and complete lines 27 through 31.			
E L T A	27	Capital stock, trust principal, or current funds			
SÑ	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
С	29	Retained earnings, accumulated income, endowment, or other funds	67,172,923.	68,914,424.	
OE RS	30	Total net assets or fund balances (see instructions)	67,172,923.	68,914,424.	
	31	Total liabilities and net assets/fund balances (see instructions)	67,172,923.	68,914,424.	
Pär	t	Analysis of Changes in Net Assets or Fund Balance		1. 00, 714, 424.	<u> </u>
1	end-	net assets or fund balances at beginning of year — Part II, column of year figure reported on prior year's return)		<u>. 1</u>	67,172,923.
2	Ente	r amount from Part I, line 27a		2	1,741,727.
3	Other	increases not included in line 2 (itemize) • GAIN ON SALE C	F SECURITIES	3	28.
4		lines 1, 2, and 3		<u> </u>	68,914,678.
5		ases not included in line 2 (itemize) FEDERAL INCOME		 	254.
6	Total	net assets or fund balances at end of year (line 4 minus line 5) - P	art II column (b) line 30	6	T 68 914 424

(a) List and descri 2-story brick warehou	d Losses for Tax on Investment be the kind(s) of property sold (e.g., real eduse; or common stock, 200 shares MLC Common stock, 200	state, (b) H	low acquired Purchase Donation	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a 2.458 Capital Inc	ome Fund	P		08/24/04	06/26/14
b					
C					
d					
e				(1) (2-1	((222)
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (e) plus (f) mi	
a 150).	1	22.		28.
b		-		 	
С					
d					
e					
	owing gain in column (h) and owned by the			(I) Gains (Co	
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (ı) over column (ı), ıf any		jain minus column (k an -0-) or Losses (fr	
a					28.
b					
С					
е					
2 Capital gain net income or (n	et capital loss) If gain, also ei	nter in Part I, line 7 -0- in Part I, line 7	2		28.
3 Net short-term capital gain or	r (loss) as defined in sections 1222(5) and	(6):			
· -		-			
if gain, also enter in Part I, IIr in Part I, line 8	ne 8, column (c) (see instructions). If (loss)	, enter -0-	3		
	der Section 4940(e) for Reduced		Income	<u>'</u>	
	ate foundations subject to the section 4940				
If 'Yes,' the foundation does not qu	ection 4942 tax on the distributable amoun ralify under section 4940(e). Do not comple	ete this part.		· · · · □Yes	X No
Enter the appropriate amount	at in each column for each year, see the ins		tries.		
(a) Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(col	(d)	
2013	200 100		1	Distributior umn (b) divided t	
2012	280,129.	7,934,1	55.		
2011	280,129.	7,934,1 6,507,6			0.035307
	268,500.		85.		0.035307 0.041259
2010	268,500. 287,250.	6,507,6	85. 51.		0.035307 0.041259 0.053851
2010 2009	268,500.	6,507,6 5,334,1	85. 51. 67.		0.035307 0.041259 0.053851 0.044564
2009	268,500. 287,250. 140,300.	6,507,6 5,334,1 3,148,2 2,228,4	85. 51. 67. 36.		0.035307 0.041259 0.053851 0.044564 0.045146
2009 2 Total of line 1, column (d) 3 Average distribution ratio for	268,500. 287,250. 140,300. 100,604.	6,507,6 5,334,1 3,148,2 2,228,4 	85. 51. 67. 36.		0.035307 0.041259 0.053851 0.044564 0.045146
2009 2 Total of line 1, column (d) 3 Average distribution ratio for number of years the foundat	268,500. 287,250. 140,300. 100,604.	6,507,6 5,334,1 3,148,2 2,228,4	85. 51. 67. 36 2	umn (b) divided I	0.035307 0.041259 0.053851 0.044564 0.045146 0.220127 0.044025
2009 2 Total of line 1, column (d) 3 Average distribution ratio for number of years the foundat 4 Enter the net value of nonch	268,500. 287,250. 140,300. 100,604.	6,507,6 5,334,1 3,148,2 2,228,4	85. 51. 67. 36 2 4	umn (b) divided I	by column (c))
2009 2 Total of line 1, column (d) . 3 Average distribution ratio for number of years the foundat 4 Enter the net value of nonch 5 Multiply line 4 by line 3	268,500. 287,250. 140,300. 100,604. the 5-year base period — divide the total cannon has been in existence if less than 5 year aritable-use assets for 2014 from Part X, li	6, 507, 6 5, 334, 1 3, 148, 2 2, 228, 4	85. 51. 67. 36 2 3 4	umn (b) divided I	0.035307 0.041259 0.053851 0.044564 0.045146 0.220127 0.044025 0,080,422.
2009 2 Total of line 1, column (d) . 3 Average distribution ratio for number of years the foundat 4 Enter the net value of nonch 5 Multiply line 4 by line 3 6 Enter 1% of net investment in	268,500. 287,250. 140,300. 100,604.	6,507,6 5,334,1 3,148,2 2,228,4	85. 51. 67. 36 2 3 4 5	umn (b) divided I	0.035307 0.041259 0.053851 0.044564 0.045146 0.220127 0.044025
2009 2 Total of line 1, column (d) . 3 Average distribution ratio for number of years the foundat 4 Enter the net value of nonch 5 Multiply line 4 by line 3 6 Enter 1% of net investment if 7 Add lines 5 and 6 8 Enter qualifying distributions	268,500. 287,250. 140,300. 100,604. The 5-year base period — divide the total control has been in existence if less than 5 year aritable-use assets for 2014 from Part X, limitable-use (1% of Part I, line 27b)	6, 507, 6 5, 334, 1 3, 148, 2 2, 228, 4 on line 2 by 5, or by the ars ne 5	85. 51. 67. 36 2 3 4 5 6	umn (b) divided l	0.035307 0.041259 0.053851 0.044564 0.045146 0.220127 0.044025 0,080,422. 443,791.

Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see	instr	uction	s)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here and enter 'N/A' on line 1	· Me		3:	Ž, i	\$\$
	Date of ruling or determination letter (attach copy of letter if necessary – see instrs)					
b	Domestic foundations that meet the section 4940(e) requirements in Part V,	1			3	52.
	check here ▶ ☐ and enter 1% of Part I, line 27b	1100		ŽŽ,		
C	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)	<u>: 3813</u>	450	<u> Piyaj</u>	المنتشة	21,234
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			3	52.
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			3	52.
6	Credits/Payments:	-iri	120			11
а	2,394.		100			
b	Exempt foreign organizations — tax withheld at source					
	: Tax paid with application for extension of time to file (Form 8868) 6 c 0 .		1.		100	
	Backup withholding erroneously withheld		3-5C			
7	Total credits and payments Add lines 6a through 6d	7			2,3	94.
8	Enter any penalty for underpayment of estimated tax. Check here	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			2.0	42.
11	Enter the amount of line 10 to be Credited to 2015 estimated tax	11				
	t VII-A Statements Regarding Activities					
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it				Yes	No
1 2	participate or intervene in any political campaign?			1 a		Х
L	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes					
	(see Instructions for the definition)?			1 b		Х
	If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published			1.00	(:3)*	8.1 4
	or distributed by the foundation in connection with the activities					<u> </u>
	Did the foundation file Form 1120-POL for this year?			1 c		Х
C	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year					
	(1) On the foundation > \$ (2) On foundation managers > \$ 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?			2	-D-27-4-4-	X
	If 'Yes,' attach a detailed description of the activities			1 7.73	777 ·	7.7
•	·					***
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		Х
4 a	a Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4 a		Х
	of 'Yes,' has it filed a tax return on Form 990-T for this year?			4 b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?			5		Х
	If 'Yes,' attach the statement required by General Instruction T			. No. 1	**:	3
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either					3
-	By language in the governing instrument, or					7
				137.0		1 J
	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		Х
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV			7	X	
	Enter the states to which the foundation reports or with which it is registered (see instructions)			R.	ci il	ĵ,
-						F '4
	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			8 b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(\$5,5°	`\s-**	, (R.T.
J	for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If 'Yes,' complete Part'.	άĭν .		9		Х
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names					
	and addresses			10		Х
				· 00		00441

Form 990-PF (2014)

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Part VII-B Statements Regarding Activiti	es for Which Form	1 4 / 20 May Be Req	uired (continued)	
5 a Dunng the year did the foundation pay or incur a	•			
(1) Carry on propaganda, or otherwise attempt to	o influence legislation (se	ection 4945(e))?	Yes X	No .
(2) Influence the outcome of any specific public on, directly or indirectly, any voter registration	n drive?			No A
(3) Provide a grant to an individual for travel, stu	dy, or other similar purpo	oses?	···· Yes X	10 1 10 0
(4) Provide a grant to an organization other than in section 4945(d)(4)(A)? (see instructions).	a chantable, etc, organiz	zation described	Yes X	No .
(5) Provide for any purpose other than religious, educational purposes, or for the prevention of	charitable, scientific, lite of cruelty to children or ar	rary, or nimals?	· · · · Yes X	No No
b If any answer is 'Yes' to 5a(1)-(5), did any of the described in Regulations section 53.4945 or in a (see instructions)?	current notice regarding	disaster assistance		5 b
Organizations relying on a current notice regardi	ng disaster assistance ch	neck here	▶ [24 60
c If the answer is 'Yes' to question 5a(4), does the tax because it maintained expenditure responsib If 'Yes,' attach the statement required by Regular	ility for the grant?		Yes	No
6 a Did the foundation, during the year, receive any to on a personal benefit contract?	funds, directly or indirectl	y, to pay premiums	Yes X	No
b Did the foundation, during the year, pay premium	ns, directly or indirectly, o	n a personal benefit con	tract?	6b X
If 'Yes' to 6b, file Form 8870				
7 a At any time during the tax year, was the foundati	· · ·			
b If 'Yes,' did the foundation receive any proceeds				
Part VIII Information About Officers, D and Contractors	irectors, Trustees,	Foundation Manag	gers, Highly Paid I	Employees,
1 List all officers, directors, trustees, foundation	····	· · ·	•	T
(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
JIM SHERMAN				
7502 Shadyvilla Ln	TRUSTEE			
HOUSTON TX 77055	2.00	0.	0.	0.
Kathryn Sherman				
7502 Shadyvilla Ln	Trustee			
Houston TX 77055	2.00	0.	0.	0.
2 Compensation of five highest-paid employee				
(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			·	
	<u> </u>		<u> </u>	ļ
Total number of other employees paid over \$50,000 .			<i>.</i>	None

Form 990-PF (2014) THE SHERMAN FOUNDATION	91-2136	
Information About Officers, Directors, Trustees, Foundation Ma and Contractors (continued)	nagers, Highly Paid Er	nployees,
3 Five highest-paid independent contractors for professional services (see instructions).		
(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		None
RantiXA Summary of Direct Charitable Activities		
		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such organizations and other beneficiaries served, conferences convened, research papers produced, etc.	as the number of	Expenses
1		
2		
*		
3		
4		
PartiX Summary of Program-Related Investments (see instructions)		
Describe the two largest program-related investments made by the foundation during the tax year of	on lines 1 and 2	Amount
1	minos i dad 2.	7,11100111
·		
		
2		
		_
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3		
BAA		Form 990-PF (2014)

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes 1 a 375,215. 1 b 6,195. 1 c 9,852,521. 1 d 10,233,931. e Reduction claimed for blockage or other factors reported on lines 1a and 1c 2 3 10,233,931. Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)....... 153,509. Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 5 10,080,422. 6 504,021. Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations Minimum investment return from Part X, line 6 1 504,021. 2 a Tax on investment income for 2014 from Part VI, line 5... 2 a b Income tax for 2014 (This does not include the tax from Part VI)...... 2 c 352. Distributable amount before adjustments. Subtract line 2c from line 1 3 503,669. 4 5 503,669. 6 7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1 7 503,669 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26 1 a 236,939. 1 b 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes 2 3 a 3 b Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 . . 4 236,939 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. 5 236,939.

Form 990-PF (2014)

Page 8

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

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Part XIII Undistributed Income (see instructions)

1 Distributable amount for 2014 from Part XI, line 7 2 Undishibuted income, if any, as of the end of 2014 a Enter amount for 2013 only. 5 Teal large ing vass 20, 20, 20 5 Exess distributions carryover, 4 any, to 2014 a From 2009. 6 From 2010. 6 From 2011. 6 From 2012. 7 Total of lines 3 at through e 20, 129 7 Total of lines 3 at through e 30, 129 7 Total of lines 3 at through e 30, 129 7 Total of lines 3 at through e 30, 129 8 Applied to 2015, but not more than line 2a b Applied to 100 of corpus (Election required — see instructions) (Election requi	T GIT AIR OHOISTIDATES HOOME (500 HIST)	(a)	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Disributible amount for 2014 from Part XI, line 7. 2 Underbutide incene, if any, as of the end of 2014 a Enter amount for 2013 only. 5 Total for price years 20 , 20 , 20 5 Excess distributions careyers, flany, could a From 2010 6 From 2011 9 From 2011 9 From 2011 9 From 2012 9 From 2012 9 From 2013 9 Applied to 2015, but not more after than fine 2a 4 Applied to 2015, but not more than fine 2a 4 Applied to 2015, but not more than fine 2a 4 Applied to 2015, but not more more of prore years (election required – see instructions) 6 Excess distributions out of corpus (election required – see instructions) 7 Treated as a distributions out of corpus (election required – see instructions) 8 Excess distributions earn on the same amount must be shown in column as indicated below: a Copus Add lines 31 4c, and 4e Subtract lines 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome Subtract line 4b from line 2b 9 Prior years undestributed encome for 2014 Subtract line 4b from line 2b 9 Prior years undest		Corpus	rears prior to 2013		2014
a Enter amount for 2013 only. b Tollal large years 20 20 20 3 Excess dictabutions carryover, if any, to 2014 a From 2008 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0					503,669.
b Total for prior yeass 20 20 20 30 3 Excess distributions cargiver, if any, to 2014 a From 2000 0 b From 2011 0 d From 2012 157,582.e e From 2013 280,129,9 f Total of lines 3 at through e 4 Qualifying distributions for 2014 from Part XII, line 4: S 236,939. a Applied to 2013, but not more than line 2a b Applied to 2013, but not more than line 2a b Applied to 2013, but not more than line 2a C Treated as distributions cut of corpus (Election required - see instructions). d Applied to 2014 distributible amount e Remaining amount distributed out of corpus (Election required - see instructions). d Applied to 2014 distributible amount e Remaining amount distributed out of corpus (Election required - see instructions). d Applied to 2014 distributible amount e Remaining amount distributed out of corpus (Election required - see instructions). d Applied to 2014 distributible amount e Remaining amount distributed out of corpus (Election required - see instructions). d Applied to 2014 distributions of the complete of 2014 (Election in Complete of 2014 distributions of the complete of 2014 (Election in Complete of 2014 distributions of the complete of 2014 distributions of the complete of 2014 distributions of the complete of 2014 distributions of 2014 dis	2 Undistributed income, if any, as of the end of 2014	of Standard		SKAN PO BANGER	
3 Excess distributions caryover, if any, to 2014 a From 2010	a Enter amount for 2013 only	AND SOME OF BURY	1. (*± ú·* i •* (i	0.	8 · · · · · · · · · · · · · · · · · · ·
a From 2019		<u></u>			
b From 2010		19/2 # 17 m - 5, 1 1		4.400.40	
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Form 990-PF (2014) THE SHERMAN FOUND				91-2136222	Page 10
PartixIV Private Operating Foundat					N/A
1 a If the foundation has received a ruling or dete is effective for 2014, enter the date of the ruli	ng		• • • • • • • • • •		-
b Check box to indicate whether the foundation		ng foundation descri		4942(j)(3) or	4942(j)(5)
2 a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year	ļ	Prior 3 years		
investment return from Part X for each year listed	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
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					
RankXV Supplementary Information assets at any time during the	(Complete this e year — see ir	part only if the nstructions.)	foundation ha	d \$5,000 or more	e in
Information Regarding Foundation Managers of the foundation who have close of any tax year (but only if they have compared to be List any managers of the foundation who owners).	re contributed more ontributed more than	n \$5,000) (See secti	on 507(d)(2))		
a partnership or other entity) of which the fou	indation has a 10%	or greater interest.	,		
2 Information Regarding Contribution, Grar Check here X if the foundation only ma requests for funds. If the foundation makes gromplete items 2a, b, c, and d.	kes contributions to	preselected charital	ble organizations ar	nd does not accept uns ons under other condi	solicited tions,
a The name, address, and telephone number of	or e-mail address of	the person to whom	applications should	l be addressed	
b The form in which applications should be sul	omitted and informa	tion and materials the	ey should include:		
c Any submission deadlines:					
d Any restrictions or limitations on awards, suc	h as by geographic	al areas, charitable fi	elds, kınds of ınstitu	itions, or other factors	

TEEA0310 06/17/14

Form 990-PF (2014)

BAA

Form 990-PF (2014) THE SHERMAN FOUNDATION

Partix Supplementary Information (continued)

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

Name and address (home or business)	3 Grants and Contributions Paid During t				
Name and address (home or business) Substantial continuous	Recipient	show any relationship to any foundation manager or	Foundation status of	ruipose di giani di j	Amount
4 The Kids Baton Rouge 422 Highland Crossing Baton Rouge LA 70810 FRELSBURG VOL FIRE DEPART 2319 FM 1291 NEW ULM TX 78933 PURPLE SONGS CAN FLY 4203 YOAKUM BOULEVARD #200 HOUSTON TX 77006 Carmel Bach Festival P O Box 575 Carmel CA 93921 Clarington Vol Fire Dept P O Box 256 Clarington OH 43915 Columbia Hill Cemetery Assn P O Box 1301 Columbia LA 71418 Food Bank Of the Rockies 10700 E 45th Ave Denver CO 80239 Texas Impact Gold-Elder 2212 Indigo Cove Ct League City TX 77573 THE Methodist Hospital Foundation P O Box 4384 Houston TX 77210 See Line 3a statement Total		substantial contributor	recipient		
### Add Crossing Baton Rouge					
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P O Box 4384 Houston TX 77210 See Line 3a statement Total	3 1		301 (0)3	CHARTT	2,500.
Houston TX 77210 501(C) 3 CHARITY 25,00 See Line 3a statement 42,50 Total					
See Line 3a statement 42,50 Total		210	501 (C) 3	CHARITY	25,000.
Total 3a 236,93					·
Total 3a 236,93					
					42,500.
					026 020
b Approved for future payment		· · · · · · · · · · · · · · · · · · ·			236,939.
	b Approved for future payment				
Total	Total			3b	-

Form **990-PF** (2014)

Part XVI-A: Analysis of Income-Producing Activities

BAA

g	s amounts unless otherwise indicated.	Unrelate	d business income	Exclude	d by section 512, 513, or 514	(2)
1 Progr	ram service revenue:	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (See instructions.)
a a	anii service revenue.			code		
ь						
č						
d						
е						
f						
g Fees	and contracts from government agencies					
-	bership dues and assessments					
	st on savings and lemporary cash investments					
4 Divide	ends and interest from securities			14	17,578.	
5 Net re	ental income or (loss) from real estate.	CHRAFA				对。然识。对这种。
a Debt-	-financed property					
b Not d	lebt-financed property					
6 Net re	ntal income or (loss) from personal property					
	r investment income					
8 Gain o	or (loss) from sales of assets other than inventory					
9 Net ır	ncome or (loss) from special events					
10 Gross	s profit or (loss) from sales of inventory			ļ		
11 Other	r revenue	Print All I			の数数に対け、機構は	
a						
b						
c						
d				ļ		
40 O	45.48	8. 4 5 7 5 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7		Committee (Street)	12.520	·
12 Subto	otal Add columns (b), (d), and (e)	3.28.2.2			17,578.	10.770
	I. Add line 12, columns (b), (d), and (e)				13	17,578.
(See works	sheet in line 13 instructions to verify calculations	5.)	<u>-</u>			
Part XV		e Accomp	lishment of Exemp	pt Purp	ooses	
***	EB Relationship of Activities to the	J		•		
Line No.	Explain below how each activity for which inc	ome is report	ed in column (e) of Part	XVI-A co	ontributed importantly to	the
Line No. ▼	Relationship of Activities to the Explain below how each activity for which inc accomplishment of the foundation's exempt p	ome is report	ed in column (e) of Part er than by providing fund	XVI-A co	ontributed importantly to	the uctions.)
	Explain below how each activity for which inc	ome is report	ed in column (e) of Part er than by providing fund	XVI-A co	ontributed importantly to	the uctions.)
	Explain below how each activity for which inc	ome is report	ed in column (e) of Part er than by providing fund	XVI-A co	ontributed importantly to	the uctions.)
	Explain below how each activity for which inc	ome is report	ed in column (e) of Part er than by providing fund	XVI-A co	ontributed importantly to	the uctions.)
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	Explain below how each activity for which inc	ome is report	ed in column (e) of Part er than by providing fund	XVI-A co	ontributed importantly to	the uctions.)

TEEA0502 06/17/14

Firm's address

Use Only

BAA

PO BOX

Huntsville

6007

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No 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 a (1) Х 1 a (2) Х (2) Other assets . . **b** Other transactions: 1 b (1) Х (1) Sales of assets to a noncharitable exempt organization. . . (2) Purchases of assets from a noncharitable exempt organization. 1 b (2) Х 1 b (3) Х (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements 1 b (4) Х 1 b (5) (5) Loans or loan guarantees Х (6) Performance of services or membership or fundraising solicitations. 1 b (6) Х 1 c Х c Sharing of facilities, equipment, mailing lists, other assets, or paid employees. . . 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. (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements (a) Line no 2 a 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? XNo b If 'Yes,' complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship 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. Sign May the IRS discuss this return with the Here preparer shown below (see instructions)?____ Yes Preparers signatur Print/Type preparer's name Check self-employed P00659512 Paul Alexander EA Paid Firm's EIN 20-5069603 LEGACY TAX SERVICES, **Preparer**

TEEA0503 06/17/14

77342-6007

Phone no

291-3603

Form 990-PF (2014)

1

Form 99	0-PF,	Page	1,	Part	I, Line	11 (
Line 11	Stmt					

Other income:	Rev/Exp Book	Net Inv Inc	Adj Net Inc
ROYALTY INCOME RECIEVED FROM K-1	1,964,689.		
BROOKSHIRE INVESTMENT TRUST 76-6174442			

Total

1,964,689.

Form 990-PF, Page 11, Part XV, line 3a Line 3a statement

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	Person or Business Checkbox Amount
a Paid during the year Thousand Oaks Family YMCA 16103 Henderson Pass San Antonio TX 78262 University Health System Foundation 903 W Martin San Antonio TX 78207 Houston Food Bank 3811 Eastex Freeway Houston TX 77026		501 (C) 3 501 (C) 3 501 (C) 3	CHARITY CHARITY CHARITY CHARITY	Person or Business X 2,500. Person or Business 20,000. Person or Business 20,000.

Total

42,500.

Form 990-PF, Page 1, Part I Line 16b - Accounting Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGACY GROUP	ACCOUNTING & TAX	3,225.			

Total

3,225.

Form 990-PF, Page 2, Part II, Line 13 L-13 Stmt

	End of Year		
Line 13 - Investments - Other:	Book Value	Fair Market Value	
INVESTMENT-BROOKSHIRE INVESTMENT TRUST	68,567,363.	10,700,000.	

91-2136222

2

Form 990-PF, Page 2, Part II, Line 13 L-13 Stmt

Continued

		End of Year		
	Line 13 - Investments - Other:	Book Value	Fair Market Value	
Total		68,567,363.	10,700,000	

Supporting Statement of:

Investments/Line 13 Book-1

Description	Amount
	68,594,906. -27,543.

Total 68, 567, 363.