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Form 990-PF

Return of Private Foundation

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

2014

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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For calendar year 2014, or tax year beginning 12-01-2014, and ending 11-30-2015

Name of foundation: The Scott Petty Foundation. Employer identification number: 74-2146978. Telephone number: [blank]. City: San Antonio, TX 78209. Accounting method: Cash. Fair market value: \$3,514,151.

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), ending with Net investment income of 257,902.

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	28,437	71,725	71,725
	2 Savings and temporary cash investments	192,111	101,567	101,567
	3 Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	2,010,081 <input checked="" type="checkbox"/>	1,647,131	1,860,027
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	1,300,544 <input checked="" type="checkbox"/>	1,271,574	1,480,832
	14 Land, buildings, and equipment basis ▶ _____ 1,951 Less accumulated depreciation (attach schedule) ▶ _____ 1,951			
15 Other assets (describe ▶ _____)	<input checked="" type="checkbox"/> 850 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 0 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 0 <input checked="" type="checkbox"/>	
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,532,023	3,091,997	3,514,151	
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 ▶ _____)	<input checked="" type="checkbox"/> 0 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 1,944	
23 Total liabilities (add lines 17 through 22)	0	1,944		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	3,532,023	3,090,053	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances (see instructions)	3,532,023	3,090,053		
31 Total liabilities and net assets/fund balances (see instructions)	3,532,023	3,091,997		

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	3,532,023
2	Enter amount from Part I, line 27a	2	-34,725
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	3,497,298
5	Decreases not included in line 2 (itemize) ▶ _____	5	407,245
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,090,053

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)
1 a PUBLICLY TRADED SECURITIES - PURCHASED	P		
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 641,012		443,484	197,528
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			197,528
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	197,528
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	420,657	3,869,852	0.108701
2012	353,988	3,800,975	0.093131
2011	201,759	3,224,246	0.062576
2010	220,749	3,679,987	0.059986
2009	215,852	3,192,746	0.067607

2 Total of line 1, column (d).	2	0.392001
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	0.0784
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	3,550,208
5 Multiply line 4 by line 3.	5	278,336
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	2,579
7 Add lines 5 and 6.	7	280,915
8 Enter qualifying distributions from Part XII, line 4.	8	286,127

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 page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	2,579
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2.	3	2,579
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	2,579
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	5,157
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	7,000
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d.	7	12,157
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	9,578
11	Enter the amount of line 10 to be Credited to 2015 estimated tax 9,578 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? <input checked="" type="checkbox"/>		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i> <input checked="" type="checkbox"/>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i> <input checked="" type="checkbox"/>		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> 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? <i>If "No," attach explanation .</i>	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No		
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No		
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ _____	13	Yes			
14	The books are in care of ▶ <u>SCOTT PETTY JR</u> Telephone no ▶ <u>(210) 225-7176</u> Located at ▶ <u>1027 AUSTIN HWY STE 200 San Antonio TX</u> ZIP +4 ▶ <u>78209</u>					
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ <table border="1" style="display: inline-table;"><tr><td>15</td><td></td></tr></table>	15				
15						
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶ _____	16	Yes	No		

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
1b	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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		
1c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

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

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i></p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If "Yes" to 6b, file Form 8870.</i></p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	5b		
	6b		No
	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
Scott Petty Jr 202 La Jara San Antonio, TX 78205	Director 0	0		
Eleanor Petty 202 La Jara San Antonio, TX 78205	Director 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

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	▶

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	3,430,097
b	Average of monthly cash balances.	1b	174,175
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,604,272
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	3,604,272
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	54,064
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,550,208
6	Minimum investment return. Enter 5% of line 5.	6	177,510

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	177,510
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	2,579
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,579
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	174,931
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	174,931
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	174,931

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	286,127
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	286,127
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	2,579
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	283,548

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				174,931
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			0	
b Total for prior years 2012, 2011, 2010		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				56,425
b From 2010.				41,002
c From 2011.				41,433
d From 2012.				168,145
e From 2013.				234,696
f Total of lines 3a through e.	541,701			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ <u>286,127</u>				
a Applied to 2013, but not more than line 2a			0	
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.				174,931
e Remaining amount distributed out of corpus	111,196			
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	652,897			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions.		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions.			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				0
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).	56,425			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a.	596,472			
10 Analysis of line 9				
a Excess from 2010.				41,002
b Excess from 2011.				41,433
c Excess from 2012.				168,145
d Excess from 2013.				234,696
e Excess from 2014.				111,196

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
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 organization had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

NA

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

NA

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

Scott Petty Jr EH Petty
1027 Austin Hwy Ste 200
San Antonio, TX 78208
(220) 225-7176

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

SUBMITTED FOR BOARD OF DIRECTORS MUST BE FOR A QUALIFIED PURPOSE

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

EDUCATION, AMATEUR SPORTS (EXCLUDING EQUIPMENT), TESTING FOR PUBLIC SAFETY, PREVENTION OF CRUELTY TO ANIMALS & CHILDREN

Part XV Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> SEE PART XV SCHEDULE 1027 AUSTIN HWY SUITE 200 SAN ANTONIO, TX 78209	NONE		GENERAL SUPPORT FUNCTION	280,583
Total				280,583
b <i>Approved for future payment</i>				
Total				3b

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

TY 2014 Depreciation Schedule

Name: The Scott Petty Foundation

EIN: 74-2146978

**TY 2014 Investments Corporate
Stock Schedule****Name:** The Scott Petty Foundation**EIN:** 74-2146978

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MORGAN STANLEY	1,647,131	1,860,027

TY 2014 Investments - Other Schedule**Name:** The Scott Petty Foundation**EIN:** 74-2146978

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
IVA INTERNATIONAL	AT COST	393,007	412,068
OPPENHEIMER INT'L GROWTH	AT COST	399,739	480,278
TEMPLETON GLOBAL	AT COST	189,704	179,719
VANGUARD S & P	AT COST	289,124	408,767

TY 2014 Other Assets Schedule

Name: The Scott Petty Foundation

EIN: 74-2146978

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTER-ENTITY RECEIVABLE - PRC	850	0	0

TY 2014 Other Expenses Schedule

Name: The Scott Petty Foundation

EIN: 74-2146978

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OVERHEAD/MANAGEMENT EXPENSE	750			750

TY 2014 Other Income Schedule

Name: The Scott Petty Foundation

EIN: 74-2146978

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Income	30	30	

TY 2014 Other Liabilities Schedule

Name: The Scott Petty Foundation

EIN: 74-2146978

Description	Beginning of Year - Book Value	End of Year - Book Value
INTER-ENTITY PAYABLE - PRC	0	1,944

TY 2014 Other Professional Fees Schedule

Name: The Scott Petty Foundation

EIN: 74-2146978

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	15,961	15,961		
OTHER LEGAL/PROFESSIONAL FEES	4,794			4,794

TY 2014 Taxes Schedule

Name: The Scott Petty Foundation

EIN: 74-2146978

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX BASED ON INVESTMENT INCOME	6,500			

SCOTT PETTY FOUNDATION

EIN 74-2146978

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

RECIPIENT	ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
100 CLUB OF SAN ANTONIO	P.O. BOX 6741 SAN ANTONIO TX 78209	PC	VARIOUS EXEMPT PURPOSES	\$ 100
ALAMO COLLEGES FOUNDATION (CHANCELLORS CIRCLE)	1300 SAN PEDRO AVE SAN ANTONIO TX 78209	PC	VARIOUS EXEMPT PURPOSES	\$ 1,000
ALAMO HEIGHTS SCHOOL FOUNDATION	-101 BROADWAY SAN ANTONIO TX 78209	PC	VARIOUS EXEMPT PURPOSES	\$ 15,000
ALZHEIMER'S ASSOCIATION SA & SO TX CHAPTER	-400 LAOUS PASTEUR SUITE 200 SAN ANTONIO TX 78229-4542	PC	VARIOUS EXEMPT PURPOSES	\$ 200
BANDERA UNITED METHODIST CHURCH	1103 CEDAR STREET BANDERA TX 78003	PC	VARIOUS EXEMPT PURPOSES	\$ 100
BIBLE LEAGUE INTERNATIONAL	1 BIBLE LEAGUE PLAZA CRETE IL 60417	PC	VARIOUS EXEMPT PURPOSES	\$ 80
BRISCO WESTERN ART MUSEUM (THE)	210 W MARKET STREET SAN ANTONIO TX 78205	PC	VARIOUS EXEMPT PURPOSES	\$ 50,000
CAESAR KLEBERG WILDLIFE RESEARCH CENTER ANSWERS	-700 UNIVERSITY BLVD MSC 218 KINGSVILLE TX 78363-8202	PC	VARIOUS EXEMPT PURPOSES	\$ 1,000
CHARITY BALL ASSOCIATION OF SAN ANTONIO	255 WIEPEAPE ROAD BRENHAM TX 77833	PC	VARIOUS EXEMPT PURPOSES	\$ 100
CHILDREN'S BEREAVEMENT CENTER OF SOUTH TEXAS	P.O. BOX 6708 SAN ANTONIO TX 78209	PC	VARIOUS EXEMPT PURPOSES	\$ 300
CHILD SAFE	205 W OLAMOS DRIVE SAN ANTONIO TX 78212	PC	VARIOUS EXEMPT PURPOSES	\$ 1,500
CHRIST EPISCOPAL CHURCH	-130 WEST US HIGHWAY 90 SAN ANTONIO TX 78222	PC	VARIOUS EXEMPT PURPOSES	\$ 10,000
EPISCOPAL DIOCESE OF WEST TEXAS (THE)	510 BELKNAP PLACE SAN ANTONIO TX 78212	PC	VARIOUS EXEMPT PURPOSES	\$ 100
FRIENDS OF HOSPICES SAN ANTONIO	P.O. BOX 6885 SAN ANTONIO TX 78209	PC	VARIOUS EXEMPT PURPOSES	\$ 10,000
HONDO EDUCATION FOUNDATION	P.O. BOX 4048 SAN ANTONIO TX 78229-1487	PC	VARIOUS EXEMPT PURPOSES	\$ 100
HONDO PUBLIC LIBRARY	2604 AVENUE E HONDO TX 78861	PC	VARIOUS EXEMPT PURPOSES	\$ 5,000
JOHN HOPKINS KIMMEL CANCER CENTER	1011 19TH STREET HONDO TX 78861	PC	VARIOUS EXEMPT PURPOSES	\$ 250
KLRN	-50 EAST PRATT ST SUITE 1700 BALTIMORE MARYLAND 21202	PC	VARIOUS EXEMPT PURPOSES	\$ 100
LOUISE H. BATZ PATIENT SAFETY FOUNDATION	C/O CYNTHIA SHIELDS, P.O. BOX 9 SAN ANTONIO TX 78291-0009	PC	VARIOUS EXEMPT PURPOSES	\$ 500
M.D. ANDERSON CANCER CENTER	-7000 JUNE BERRY C/O E. AUSTIN TX 78750	PC	VARIOUS EXEMPT PURPOSES	\$ 1,000
M.D. ANDERSON CANCER CENTER	P.O. BOX 4470 HOUSTON TX 77210-4470	PC	VARIOUS EXEMPT PURPOSES	\$ 1,48
M.D. ANDERSON CANCER CENTER	P.O. BOX 4464 HOUSTON TX 77210-4464	PC	VARIOUS EXEMPT PURPOSES	\$ 3,000
MEDINA COUNTY JUNIOR LIVESTOCK SHOW	P.O. BOX 4486 HOUSTON TX 77210-4486	PC	VARIOUS EXEMPT PURPOSES	\$ 300
METHODIST HEALTHCARE MINISTRIES OF SOUTH TX	C/O BRENDIA PRESTAGE 1506 AVENUE M HONDO TX 78861	PC	VARIOUS EXEMPT PURPOSES	\$ 1,000
NATIONAL RANCHING HERITAGE CENTER	4507 MEDICAL DR SAN ANTONIO TX 78299	PC	VARIOUS EXEMPT PURPOSES	\$ 100
OPERATION GAME THIEF	3121 4TH STREET LUBBOCK TX 79409	PC	VARIOUS EXEMPT PURPOSES	\$ 50
SAMMINISTRIES	P.O. BOX 18583 AUSTIN TX 78760	PC	VARIOUS EXEMPT PURPOSES	\$ 3,000
SAN ANTONIO BOTANICAL GARDEN	5254 BLANCO ROAD SAN ANTONIO TX 78216	PC	VARIOUS EXEMPT PURPOSES	\$ 500
SAN ANTONIO CANE HIGH SCHOOL MHL 2015	P.O. BOX 6569 SAN ANTONIO TX 78206-0569	PC	VARIOUS EXEMPT PURPOSES	\$ 43,145
SAN ANTONIO CHILDREN'S MUSEUM	1807 CENTENNIAL BLVD SAN ANTONIO TX 78211	PC	VARIOUS EXEMPT PURPOSES	\$ 2,50
SAN ANTONIO CHRISTIAN DENTAL CLINIC	305 E HOUSTON ST SAN ANTONIO TX 78205	PC	VARIOUS EXEMPT PURPOSES	\$ 50,095
SAN ANTONIO LIVESTOCK EXPOSITION INC	#1 HEAVEN FOR HOPE WAY BLDG #1 STE #400 SAN ANTONIO TX 78207	PC	VARIOUS EXEMPT PURPOSES	\$ 250
SEG FOUNDATION	P.O. BOX 200230 SAN ANTONIO TX 78250-0230	PC	VARIOUS EXEMPT PURPOSES	\$ 5,000
SOUTH TEXAS PROPERTY RIGHTS ASSOCIATION	3903 N ST MARA S STREET SAN ANTONIO TX 78212-3199	PC	VARIOUS EXEMPT PURPOSES	\$ 30,000
SOUTHWEST SCHOOL OF ART & CRAFT	P.O. BOX 70230 TULSA OK 74102-0230	PC	VARIOUS EXEMPT PURPOSES	\$ 2,000
ST PETER EPISCOPAL CHURCH	P.O. BOX 397 FALFURRIAS TX 78355	PC	VARIOUS EXEMPT PURPOSES	\$ 200
TEXAS & SOUTHWESTERN CATTLE RAISERS FOUNDATION	300 AUGUSTA SAN ANTONIO TX 78205-1216	PC	VARIOUS EXEMPT PURPOSES	\$ 5,500
TEXAS BLUEBIRD SOCIETY	412 N LILJE OAK ROCKPORT TX 78382	PC	VARIOUS EXEMPT PURPOSES	\$ 2,500
TEXAS BRIGADES WILDLIFE LEADERSHIP CAMPS (THE)	1301 W 4th STREET FORT WORTH TX 3102-2665	PC	VARIOUS EXEMPT PURPOSES	\$ 100
TEXAS CALVALIER CHARITABLE FOUNDATION	P.O. BOX 760549 SAN ANTONIO TX 78245-0549	PC	VARIOUS EXEMPT PURPOSES	\$ 950
TEXAS HEART INSTITUTE	P.O. BOX 40868 AUSTIN TX 78704	PC	VARIOUS EXEMPT PURPOSES	\$ 100
TEXAS PUBLIC RADIO	3660 THOUSAND OAKS DR SUITE 126 SAN ANTONIO TX 78247	PC	VARIOUS EXEMPT PURPOSES	\$ 100
TRINITY UNIVERSITY	DEVELOPMENT OFFICE-AC-3-117 P.O. BOX 20345 HOUSTON TX 77255-0345	PC	VARIOUS EXEMPT PURPOSES	\$ 800
UNITED WAY OF SAN ANTONIO (PRESIDENTS ASSOCIATES)	8401 DATAPOINT DR SAN ANTONIO TX 78229	PC	VARIOUS EXEMPT PURPOSES	\$ 365
UNIVERSITY OF TEXAS AT AUSTIN (PRESIDENTS ASSOCIATES)	ONE TRINITY PLACE #49 SAN ANTONIO TX 78212-7200	PC	VARIOUS EXEMPT PURPOSES	\$ 100
UNIVERSITY OF TEXAS HEALTH SCIENCE CENTER	P.O. BOX 898 SAN ANTONIO TX 78293-0898	PC	VARIOUS EXEMPT PURPOSES	\$ 10,000
UT HEALTH SCIENCE CENTER	MAIN BLDG 400 P.O. BOX T AUSTIN TX 78713-8920	PC	VARIOUS EXEMPT PURPOSES	\$ 2,000
UT HEALTH SCIENCE CENTER	ONE UTSA CIRCLE SAN ANTONIO TX 78249-9963	PC	VARIOUS EXEMPT PURPOSES	\$ 1,000
WINTER GARDEN SOIL & WATER CONSERVATION DISTRICT #326	-979 WURZBACH ROAD SAN ANTONIO TX 78229	PC	VARIOUS EXEMPT PURPOSES	\$ 100
WITTE MUSEUM	P.O. BOX 1321 HOUSTON TX 77251-1321	PC	VARIOUS EXEMPT PURPOSES	\$ 1,500
	-703 FLOYD CURLE DR MC 7835 SAN ANTONIO TX 78229	PC	VARIOUS EXEMPT PURPOSES	\$ 4,200
	319 N 1ST AVENUE SUITE 2 CRYSTAL CITY TX 78839	PC	VARIOUS EXEMPT PURPOSES	\$ 200
	3801 BROADWAY SAN ANTONIO TX 78209-6396	PC	VARIOUS EXEMPT PURPOSES	\$ 4,250
TOTAL GRANTS & CONTRIBUTIONS				\$ 280,583

THE SCOTT PETTY FOUNDATION HAS NO RELATIONSHIP WITH ANY OF THE ABOVE ORGANIZATIONS. NONE OF THE CHARITIES LISTED ABOVE ARE PRIVATE FOUNDATIONS.