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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation Lola Wright Foundation co US Trust		A Employer identification number 74-6054717	
Number and street (or P O box number if mail is not delivered to street address) 515 Congress Ave 10th Floor		B Telephone number (see instructions) (512) 397-2001	
City or town, state or province, country, and ZIP or foreign postal code Austin, TX 78701		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		Initial return of a former public charity ☐ Amended return ☐ 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		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 ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 24,591,663		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (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				
	4 Dividends and interest from securities	592,269	592,269		
	5a Gross rents	343,804	343,804		
	b Net rental income or (loss) <u>343,804</u>				
	6a Net gain or (loss) from sale of assets not on line 10	360,748			
	b Gross sales price for all assets on line 6a <u>9,202,424</u>				
	7 Capital gain net income (from Part IV, line 2) . . .		360,748		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	☒ 2,850	2,850		
	12 Total. Add lines 1 through 11	1,299,671	1,299,671		
	13 Compensation of officers, directors, trustees, etc	20,000			20,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	☒ 9,050			9,050
	c Other professional fees (attach schedule)	☒ 187,282	187,282		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	☒ 62,886	52,285		
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	☒ 613			613
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	279,831	239,567		29,663
	25 Contributions, gifts, grants paid	1,318,496			1,318,496
	26 Total expenses and disbursements. Add lines 24 and 25	1,598,327	239,567		1,348,159
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-298,656			
	b Net investment income (if negative, enter -0-)		1,060,104		
	c Adjusted net income (if negative, enter -0-) . . .				

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing				
	2	Savings and temporary cash investments	978,200	1,827,449	1,827,449	
	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	5,669	14,399	14,399	
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)	13,424,478	12,338,261	14,039,214	
	c	Investments—corporate bonds (attach schedule)	3,905,434	4,027,113	3,886,861	
	11	Investments—land, buildings, and equipment basis ▶ _____				
	Less accumulated depreciation (attach schedule) ▶ _____					
12	Investments—mortgage loans.					
13	Investments—other (attach schedule)	2,784,137	2,592,040	4,823,740		
14	Land, buildings, and equipment basis ▶ _____					
	Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)					
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	21,097,918	20,799,262	24,591,663		
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		
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	21,097,918	20,799,262		
	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				
	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)	21,097,918	20,799,262		
	31	Total liabilities and net assets/fund balances(see instructions)	21,097,918	20,799,262		

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	21,097,918
2	Enter amount from Part I, line 27a	2	-298,656
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	20,799,262
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	20,799,262

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	Publicly Traded - U S Trust	P	2015-12-31	2015-12-31
b				
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a 9,202,424		8,841,676	360,748
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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
a			360,748
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	360,748
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	360,748

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))
2014	1,355,773	25,321,316	0 05354
2013	1,172,779	23,641,088	0 04961
2012	1,144,672	22,875,163	0 05004
2011	1,147,721	22,486,156	0 05104
2010	1,016,445	22,761,367	0 04466

2 Total of line 1, column (d).	2	0 248889
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 049778
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	25,143,336
5 Multiply line 4 by line 3.	5	1,251,585
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	10,601
7 Add lines 5 and 6.	7	1,262,186
8 Enter qualifying distributions from Part XII, line 4.	8	1,348,159

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 ☐			
		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	10,601
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	10,601
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	10,601
6		Credits/Payments			
a	2015 estimated tax payments and 2014 overpayment credited to 2015		6a	25,000	
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	25,000
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	14,399
11		Enter the amount of line 10 to be Credited to 2015 estimated tax 14,399 Refunded		11	

Part VII-A

Statements Regarding Activities

1a		During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?			Yes	No
				1a		No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?		1b		No
		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.				
c		Did the foundation file Form 1120-POL for this year?		1c		No
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		No
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year?		4b		No
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		5		No
6		Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either				
		• By language in the governing instrument, or				
		• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes	
7		Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.		7	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see instructions) TX _____				
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	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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV		9		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10		No

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 ▶N/A	13	Yes	
14	The books are in care of ▶US Trust Located at ▶515 Congress Ave 10th Floor Austin TX Telephone no ▶(512) 397-2001 ZIP+4 ▶78701			
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		
16	At any time during calendar year 2015, 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? ☐ 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)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		No
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 2015?.	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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?. ☐ 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).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2015 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 2015.</i>).	3b		No
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 2015?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (Continued)

5a

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes

No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

Yes

No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

Yes

No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

No

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

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes

No

b

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

7b

No

Part VIII

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

1

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

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

2

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

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

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

Form 990-PF (2015)

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

Total number of others receiving over \$50,000 for professional services.	1
--	---

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	

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	

Form **990-PF** (2015)

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	21,821,225
b	Average of monthly cash balances.	1b	1,617,687
c	Fair market value of all other assets (see instructions).	1c	2,087,317
d	Total (add lines 1a, b, and c).	1d	25,526,229
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	
3	Subtract line 2 from line 1d.	3	25,526,229
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	382,893
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	25,143,336
6	Minimum investment return. Enter 5% of line 5.	6	1,257,167

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	1,257,167
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	10,601
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	10,601
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,246,566
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,246,566
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	1,246,566

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	1,348,159
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	1,348,159
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	10,601
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,337,558

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				1,246,566
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			325,263	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 1,348,159				
a Applied to 2014, but not more than line 2a			325,263	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				1,022,896
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2015 (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 2014 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				223,670
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 2010 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.				
10 Analysis of line 9				
a Excess from 2011. . . .				
b Excess from 2012. . . .				
c Excess from 2013. . . .				
d Excess from 2014. . . .				
e Excess from 2015. . . .				

Part XIV

a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, 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)

a 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

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.)**

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))

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

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

Lola Wright Foundation
515 Congress Ave 10th Floor
Austin, TX 78701
(512) 397-2001

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

Go to - www.fdnweb.org/lolawright for Applicant Instructions and Grant Application Procedures & Forms

c Any submission deadlines

February 28th and August 31st (semi-annual grant analysis)

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

Geographical Restrictions - The organization must be located and operated primarily within a 50-mile radius of Austin, Texas Fields of Interest a Children and Youthb Public Health and Human Servicesc Education and Community Developmentd Arts and Culture

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

Form **990-PF** (2015)

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	_____					
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					
4	Dividends and interest from securities.			14	592,269	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.			15	343,804	
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			18	360,748	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a <u>Miscellaneous income</u>					2,850
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e).				1,296,821	2,850
13	Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		1,299,671

[illegible]

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.

	Yes	No
1a(1)		No
1a(2)		No
1b(1)		No
1b(2)		No
1b(3)		No
1b(4)		No
1b(5)		No
1b(6)		No
1c		No

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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.

* * * * *

2016-05-19

* * * * *

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below
(see instr)? ☒ Yes ☐ No

**Paid
Preparer
Use
Only**

Print/Type preparer's name Bob Dunagan	Preparer's Signature	Date	Check if self-employed ☒	PTIN P00235005
Firm's name ☒ Dunagan Jack LLP			Firm's EIN ☒	
Firm's address ☒ 3724 Jefferson Street Suite 307 Austin, TX 78731			Phone no (512) 420-8997	

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
Wilford Flowers	President 1 00	2,500		
515 Congress Ave 10th Floor Austin,TX 78701				
Paul Higers	Vice President 1 00	2,500		
515 Congress Ave 10th Floor Austin,TX 78701				
Ron Oliveira	Secretary 1 00	2,500		
515 Congress Ave 10th Floor Austin,TX 78701				
Adrian R Fowler	Director 1 00	2,500		
515 Congress Ave 10th Floor Austin,TX 78701				
Carole Keeton	Director 1 00	2,500		
515 Congress Ave 10th Floor Austin,TX 78701				
Brandy Mueller	Director 1 00	2,500		
515 Congress Ave 10th Floor Austin,TX 78701				
Geronimo Rodriguez	Director 1 00	2,500		
515 Congress Ave 10th Floor Austin,TX 78701				
Jay B Stewart	Director 1 00	2,500		
515 Congress Ave 10th Floor Austin,TX 78701				

TY 2015 Accounting Fees Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Audit and tax return	9,050	0	0	9,050

TY 2015 Investments Corporate Bonds Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 15000324

Software Version: 2015v2.0

Name of Bond	End of Year Book Value	End of Year Fair Market Value
U.S. Trust - Fixed Income	4,027,113	3,886,861

TY 2015 Investments Corporate Stock Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 15000324

Software Version: 2015v2.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
U.S. Trust - Equities/securities	12,338,261	14,039,214

TY 2015 Investments - Other Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 15000324

Software Version: 2015v2.0

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Oil and Gas properties	AT COST	197	2,087,317
U.S. Trust - Hedge Funds	AT COST	1,427,600	1,353,108
U.S. Trust - REIT	AT COST	1,164,243	1,383,315
U.S. Trust - Other	AT COST		

TY 2015 Other Expenses Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 15000324

Software Version: 2015v2.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Insurance, fees, and other	613			613

TY 2015 Other Income Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 15000324

Software Version: 2015v2.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Miscellaneous income	2,850	2,850	

TY 2015 Other Professional Fees Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank fees	153,542	153,542	0	0
Investment advisor fees	33,740	33,740	0	0

TY 2015 Taxes Schedule

Name: Lola Wright Foundation
co US Trust

EIN: 74-6054717

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal income/excise taxes	10,601			
Property taxes	52,285	52,285		

Lola Wright Foundation
EIN 74-6054717
Contributions, Gifts, Grants Paid
Form 990-PF, Part XV
For the year ended December 31, 2014

Recipient	Date Paid	Purpose	Amount
AGE of Central Texas	11 18 2015	Two wheel chair accessible vehicles for elderly	\$ 25.707
Aids Services of Austin	5 13 2015	Four AC units	20.000
Animal Trustee of Austin	11 18 2015	IV fluid pumps for surgeries and a new cage	9.436
Are of the Capital Area	5 13 2015	Technology upgrade	10.000
Assistance League Georgetown area	5 13 2015	Operation School Bell	10.000
Austin Area Urban League, Inc	11 18 2015	Mission Stat performance management	11.000
Austin Children's Shelter	11 18 2015	Remove and replace flooring	7.500
Austin Club House	11 18 2015	Purchase clubhouse management system and computers	10.000
Austin Harm Reduction	11 18 2015	Purchase Piccolo Express -on-site comprehensive metabolic	9.000
Austin History Center Association	5 13 2015	Traveling exhibit	9.200
Austin Opera	11 18 2015	Facility rental for Austin Opera K-12 education program	6.748
Austin Smiles	5 13 2015	Equipment upgrade	1.880
Austin Symphony	11 18 2015	Support elementary school program	10.000
AustinFree.net	5 13 2015	20 tablets training lab	15.000
Austin-Travis County Integral Care	11 18 2015	Construction of homeless housing project	50.000
Avance - Austin	5 13 2015	Remodel Allan Center	11.455
Big Brothers Big Sisters	5 13 2015	Capital Campaign Mentoring Center	15.000
Blackland Community Development	11 18 2015	Completion of storm sewer line	5.000
Bookspring	11 18 2015	Support books for early literacy program	10.000
Boys & Girls Clubs of the Highland Lakes	11 18 2015	Mulch for playground	4.600
Candlelight Ranch	5 13 2015	Tents, sleeping bags, tables	8.427
Capital Area Food Bank	5 13 2015	Mobile food pantry	25.000
Caritas of Austin	5 13 2015	Equipment and furniture for new location	20.000
Casa Marianella	5 13 2015	Refrigerator, freezer, and stove	7.073
CASA of Travis County	11 18 2015	Produce two new training videos	5.000
Center for Child Protection	11 18 2015	Upgrade server	8.628
Child Inc	11 18 2015	Purchase and install commercial dishwashers	13.779
College Houses Cooperatives	11 18 2015	Facility improvements for disabled members	5.000
Community Care	5 13 2015	Panoramic x-ray machine	15.000
Con Mi Madre	5 13 2015	Projector, screen, and computer	8.245
Dress for Success	5 13 2015	Program costs	5.000
Drive a Senior Network	11 18 2015	Emergency rides for seniors	10.000
E3 Alliance	5 15 2015	Campus assessment training and tools	10.000
Easter Seals Central Texas	5 15 2015	Landscape Equipment	9.000
Economic Growth Business Incubator	11 18 2015	Training program	10.000
El Buen Pastor early Childhood	11 18 2015	Meals and scholarships funding	15.000
El Buen Samaritano	5 15 2015	Table and chairs for classroom	27.320
Exponent Philanthropy	5 15 2015	General operations	500
Extend-A-Care for Kids	5 15 2014	Summer enrichment camp	20.000
Family Crisis Center	11 19 2015	Purchase laptops and flat screens	6.000
Family Eldercare	11 18 2015	Replace computers	11.000
Foster Angels of Central Texas	5 15 2015	Cribs, toddler beds, sheets, and pads	19.553

Grants Paid
Schedule A

Lola Wright Foundation
EIN 74-6054717
Contributions, Gifts, Grants Paid
Form 990-PF, Part XV
For the year ended December 31, 2014

Recipient	Date Paid	Purpose	Amount
Foundation for the Homeless	5/18/2015	Survival skills program	10,000
Foundation Communities	11/19/2015	Rooftop terrace community space	\$ 12,500
Girls Empowerment Network	11/19/2015	Purchase furniture	8,424
Girlsstart	5/18/2015	Stem summer camp materials	5,000
Green Doors	11/19/2015	Purchase machine to eliminate bed bugs	8,000
Habitat for Humanity - Williamson County	5/19/2015	Purchase truck	15,000
Habitat for Humanity - Austin	5/18/2015	New building capital costs	30,000
Hays-Caldwell Women's Center	5/19/2015	Colposcope, computer, and printer	12,834
Helping Hand Home for Children	5/19/2015	Furniture for residence home	28,715
Hispanic Alliance	11/19/2015	Provide 20 students with instruments and 4 tablets	9,000
Hispanic Scholarship Consortium	5/19/2015	Equipment replacement	3,725
Hope House	5/19/2015	Appliance for Liberty Hill shelter	7,000
Hospice Austin	11/19/2015	Charity and uncompensated care program cost	25,000
Interfaith Action of Central Texas	11/19/2015	Program materials, camera, and computers	19,446
Jeremiah Program	11/19/2015	Security system for new building	15,000
Labyrinth Community Garden	5/19/2015	Shed, irrigation system, fence	2,566
Lions Clubs International	11/19/2015	Kidsight vision screening for children	3,750
Literacy Coalition of Central Texas	5/19/2015	Office Equipment	5,234
Little Helping Hands	11/19/2015	Supply costs	3,940
Mainspring Schools	5/19/2015	Kitchen countertops	2,500
Manos de Cristo	5/19/2015	Operator's chair and dental tools	22,068
Meals on Wheels and More	5/19/2015	Daily Hot Meal program	20,000
Mexic- Arte Museum	5/19/2015	Collection care and preservation project	5,000
Mobile Loaves & Fishes	5/19/2015	Micro-home in New Village	15,000
Open Door Preschools	11/19/2015	New flooring	9,250
People's Community Clinic	11/19/2015	Expansion project	25,000
Planned Parenthood of Greater Texas	5/19/2015	Software update SharePoint data	15,000
Project Transitions, Inc	5/19/2015	Kitchen appliances	10,000
Ronald McDonald House Charities	11/19/2015	Underwriting cost of bedroom at Seton family room	10,000
Safeplace	11/19/2015	28 laptops for agency staff	10,000
Salvation Army	11/19/2015	Capital campaign	65,000
Seedling Foundation	11/19/2015	Software, projector, office furniture, other items	12,404
Spirit Reins	11/19/2015	Technology and equipment upgrade	8,000
St. Edward's University	5/19/2015	Scholarship support	7,500
Texas RioGrande Legal Aid, Inc	11/19/2015	Cost to place and re-engineer roof	10,000
The Seton Fund	5/19/2015	Fund construction and equipment - medical school	130,000
The Seton Fund	11/20/2015	Fund construction and equipment - medical school	130,000
The Settlement Home for Children	5/19/2015	Kitchen and laundry room appliances	18,300
Trinity Center	5/19/2015	Food and clothing for homeless	5,000
United Way of Greater Austin	5/19/2015	Annual fair share	10,000
Urban Roots	11/19/2015	Support youth farm internship	7,500
Volunteer Legal Services of Central Texas	11/19/2015	New server for case management	14,388
Waterloo Counseling Center	5/19/2015	Server upgrade and furniture	5,961

Grants Paid
Schedule A

Lola Wright Foundation
 EIN 74-6054717
 Contributions, Gifts, Grants Paid
 Form 990-PF, Part XV
 For the year ended December 31, 2014

Recipient	Date Paid	Purpose	Amount
Women's Storybook Project	5/19/2015	Technology upgrade	4,440
Wonders & Worries	5/19/2015	Technology infrastructure and supplies	\$ 10,000
			<u>\$ 1,318,496</u>