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INTERNAL REVENUE SERVICE

Extended to November 15, 2016

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 separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2015 or tax year beginning

, and ending

Name of foundation Carl C Anderson Sr and Marie Jo Anderson Charitable Foundation		A Employer identification number 74-6078530
Number and street (or P.O. box number if mail is not delivered to street address) Bank of America, N.A. P.O. Box 831041	Room/suite	B Telephone number 800-357-7094
City or town, state or province, country, and ZIP or foreign postal code Dallas, TX 75283-1041		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 77,773,901.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	133,143.	133,147.		Statement 1
	4 Dividends and interest from securities	1,250,749.	1,250,749.		Statement 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	2,862,747.			
	b Gross sales price for all assets on line 6a	59,778,718.			
	7 Capital gain net income (from Part IV, line 2)		2,862,747.		
	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)				
	11 Other income	682,615.	746,245.		Statement 3
	12 Total. Add lines 1 through 11	4,929,254.	4,992,888.		
	13 Compensation of officers, directors, trustees, etc.	663,468.	279,385.		384,083.
	14 Other employee salaries and wages	145,219.	0.		145,219.
	15 Pension plans, employee benefits	53,029.	0.		53,029.
	16a Legal fees				
	b Accounting fees	26,489.	0.		26,489.
	c Other professional fees	65,838.	55,728.		10,110.
	17 Interest				
	18 Taxes	340,453.	96,400.		26,053.
	19 Depreciation and depletion	486.	0.		
	20 Occupancy	49,683.	0.		49,683.
	21 Travel, conferences, and meetings	8,260.	0.		8,260.
	22 Printing and publications				
	23 Other expenses	44,950.	18,497.		45,805.
	24 Total operating and administrative expenses. Add lines 13 through 23	1,397,875.	450,010.		748,731.
	25 Contributions, gifts, grants paid	3,670,000.			3,670,000.
	26 Total expenses and disbursements. Add lines 24 and 25	5,067,875.	450,010.		4,418,731.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-138,621.			
	b Net investment income (if negative, enter -0-)		4,542,878.		
	c Adjusted net income (if negative, enter -0-)			N/A	

523501 11-24-15 LHA For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	39,195.	75,858.	75,858.	
	2 Savings and temporary cash investments	1,508,570.	1,722,314.	1,722,459.	
	3 Accounts receivable				
	Less: allowance for doubtful accounts				
	4 Pledges receivable				
	Less: allowance for doubtful accounts				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable				
	Less: allowance for doubtful accounts				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock Stmt 10	50,578,942.	54,980,780.	57,758,656.	
	c Investments - corporate bonds Stmt 11	10,110,930.	5,241,699.	5,206,939.	
	Liabilities	11 Investments - land, buildings, and equipment basis			
Less: accumulated depreciation					
12 Investments - mortgage loans					
13 Investments - other Stmt 12		9,038,922.	9,127,259.	13,007,325.	
14 Land, buildings, and equipment, basis Stmt 13		45,513.			
Less: accumulated depreciation Stmt 13		44,979.			
15 Other assets (describe SECURITY DEPOSIT)		2,130.	2,130.	2,130.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		71,279,709.	71,150,574.	77,773,901.	
17 Accounts payable and accrued expenses					
18 Grants payable					
19 Deferred revenue					
20 Loans from officers, directors, trustees, and other disqualified persons					
21 Mortgages and other notes payable					
22 Other liabilities (describe)					
23 Total liabilities (add lines 17 through 22)	0.	0.			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here X				
	27 Capital stock, trust principal, or current funds	71,279,709.	71,150,574.		
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.		
30 Total net assets or fund balances	71,279,709.	71,150,574.			
31 Total liabilities and net assets/fund balances	71,279,709.	71,150,574.			

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	71,279,709.
2 Enter amount from Part I, line 27a	2	-138,621.
3 Other increases not included in line 2 (itemize) See Statement 8	3	122,872.
4 Add lines 1, 2, and 3	4	71,263,960.
5 Decreases not included in line 2 (itemize) See Statement 9	5	113,386.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	71,150,574.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Sale of publicly traded securities	P		
b LTCG	P		
c 1250 Gain Dividends	P		
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 59,620,645.		56,915,971.	2,704,674.
b 157,950.			157,950.
c 123.			123.
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) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			2,704,674.
b			157,950.
c			123.
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	2,862,747.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2014	4,298,445.	85,769,312.	.050116
2013	2,959,217.	82,556,303.	.035845
2012	1,822,536.	64,275,638.	.028355
2011	2,924,398.	64,129,766.	.045601
2010	3,735,499.	57,761,282.	.064671

2 Total of line 1, column (d)	2	.224588
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	.044918
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	82,984,390.
5 Multiply line 4 by line 3	5	3,727,493.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	45,429.
7 Add lines 5 and 6	7	3,772,922.
8 Enter qualifying distributions from Part XII, line 4	8	4,418,731.

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.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	45,429.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	45,429.
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	45,429.
6 Credits/Payments:			
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a	173,527.	
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	173,527.	
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	128,098.	
11 Enter the amount of line 10 to be Credited to 2016 estimated tax	11	128,098. (Refunded)	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2	X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>NM, TX</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	X	
14 The books are in care of ► <u>Bradford H. Robb</u> Telephone no. ► <u>512-458-2285</u> Located at ► <u>114 W. 7th Street, Suite 1200, Austin, TX</u> ZIP+4 ► <u>78701</u>		
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		
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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception: Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here		X
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?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?		X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

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

6b ☒

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

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

N/A

7b

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

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

(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
See Statement 14		663,468.	10,847.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Catherine Sitton - 114 West 7th Street, Suite 1200, Austin, TX 78701	Grant Manager 40.00	74,132.	2,258.	0.
Sherrill Geraty - 114 West 7th Street, Suite 1200, Austin, TX 78701	Grant manager 40.00	71,087.	2,167.	0.

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

0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0.

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Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	76,677,807.
b	Average of monthly cash balances	1b	1,496,539.
c	Fair market value of all other assets	1c	6,073,766.
d	Total (add lines 1a, b, and c)	1d	84,248,112.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	84,248,112.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,263,722.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	82,984,390.
6	Minimum investment return. Enter 5% of line 5	6	4,149,220.

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	4,149,220.
2a	Tax on investment income for 2015 from Part VI, line 5	2a	45,429.
b	Income tax for 2015 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	45,429.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,103,791.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	4,103,791.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	4,103,791.

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	4,418,731.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	4,418,731.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	45,429.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,373,302.

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)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				4,103,791.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			2,384,089.	
b Total for prior years:		0.		
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	0.			
4 Qualifying distributions for 2015 from Part XII, line 4: ▶ \$ 4,418,731.				
a Applied to 2014, but not more than line 2a			2,384,089.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2015 distributable amount				2,034,642.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016				2,069,149.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2016 Subtract lines 7 and 8 from line 6a	0.			
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				

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Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution **	Amount
a Paid during the year				
7 Star Therapeutic Riding Center PO Box 50655 Amarillo, TX 79159		Public Charity	General Operations	5,000.
Age of Central Texas 3710 Cedar Street Austin, TX 78705		Public Charity	Adult Day Health Care; general operations	35,000.
Albuquerque Community Foundation 624 Tijeras Avenue, NW Albuquerque, NM 87102		Public Charity	Emergency Fund	5,000.
Albuquerque Health Care for the Homeless, Inc. P.O. Box 25445 Albuquerque, NM 87125		Public Charity	Dental program; Con Ninos Program	25,000.
All Faiths 1709 Moon Street NE Albuquerque, NM 87112		Public Charity	General Operations	30,000.
Total See continuation sheet(s) ▶ 3a				3,670,000.
b Approved for future payment				
None				
Total ▶ 3b				0.

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** See Purpose of Grant continuations

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Alzheimer's Association, NM Chapter 9500 Montgomery Boulevard NE, Suite 121 Albuquerque, NM 87111		Public Charity	General Operations	4,000.
Animal Humane New Mexico 615 Virginia St SE Albuquerque, NM 87108		Public Charity	General Operations	4,000.
Any Baby Can of San Antonio 217 Howard St. San Antonio, TX 78212		Public Charity	Reaching Families Facing Autism; ECI Program	40,000.
ARCA 11300 Lomas Blvd. NE Albuquerque, NM 87112		Public Charity	Foster care services	30,000.
Austin Child Guidance Center 810 W 45th Street Austin, TX 78751		Public Charity	mental health services for children	20,000.
Austin Community Foundation 4315 Guadalupe Street #300 Austin, TX 78751		Public Charity	General operations	48,000.
Austin Diaper Bank 6418 Clairmont Drive Austin, TX 78749		Public Charity	General Operations	5,000.
Austin Public Education Foundation 1111 6TH Street Austin, TX 78703		Public Charity	Back to School Bash and Safety Fair	5,000.
Austin We Care 5901 North IH-35 Austin, TX 78723		Public Charity	Back to School Supplies	1,000.
Barnabas Connection 1200 County Road 1492 Wimberley, TX 78676		Public Charity	Flood Relief; back to school supplies	13,000.
Total from continuation sheets				3,570,000.

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Battered Women's Foundation PO BOX 54888 Hurst, TX 76054		Public Charity	Program for children of domestic violence	5,000.
Beaumont ISD 3395 Harrison Ave. Beaumont, TX 77706		Public Charity	breakfast in the classroom start up costs	4,118.
Beth Shalom Ministries PO Box 38 Staples, TX 78670		Public Charity	2015 Christmas Program	5,000.
Bethel Community Storehouse PO Box 968 Moriarty, NM 87035		Public Charity	General Operations	10,000.
Blessings in a Backpack 8724 Turning Leaf Boerne, TX 78015		Public Charity	Weekend backpack program	10,000.
Blue Santa - San Marcos 2300 IH35 South San Marcos, TX 77866		Public Charity	2015 Christmas Program	2,000.
Boys and Girls Club of Midland 1321 S Goode St. Midland, TX 79701		Public Charity	A/C repair at Taylor Club	10,000.
Boys and Girls clubs of Austin Area 5407 North IH-35, Suite 400 austin, TX 78723		Public Charity	Summer Program; General Operations	10,000.
Brighter Tomorrows PO Box 532151 Grand Prairie, TX 75053		Public Charity	Emergency Shelter for domestic violence	5,000.
Brookwood in Georgetown P.O. Box 845 Georgetown, TX 78627		Public Charity	Operational and tuition assistance	25,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Carrie Tingley Hospital Foundation 700 Lomas Blvd NE #2-200 Albuquerque, NM 87102		Public Charity	Patient and Family Assistance Program	20,000.
Casa of Travis County, Inc. 7701 N Lamar Blvd., Suite 301 Austin, TX 78752		Public Charity	Transitioning Youth program	15,000.
Children's Grief Center of New Mexico Inc. 3001 Trellis Dr. NW Albuquerque, NM 87107		Public Charity	General Operations	5,000.
Children's Health, Academic, and Safety, Inc. P.O. Box 15391 Fort Worth, TX 76119		Public Charity	assistance for low income families	10,000.
Christian Community Storehouse of Keller 4640 Keller Hicks Rd. Keller, TX 76244		Public Charity	Programs for children	5,000.
Christian Senior Services 4306 NW Loop 410 San Antonio, TX 78229		Public Charity	Grace Place Alzheimer's Activity Center	20,000.
Christina Kent Early Childhood Center 423 3RD Street SW Albuquerque, NM 87105		Public Charity	General Operations	25,000.
Citizens Caring for Children 730 W Wilshire Blvd #111 Oklahoma City, OK 73116		Public Charity	General Operations	10,000.
City Rescue Mission 800 W California Ave. Oklahoma City, OK 73106		Public Charity	General Operations	5,000.
Clovis Meals on Wheels 804 W. Manana Blvd Clovis, NM 88101		Public Charity	General Operations	5,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Community Action Inc. of Central Texas 101 Uhland Rd. San Marcos, TX 78666		Public Charity	Martindale area flood relief	10,000.
Community Children's Clinic 1101 E Front St. Midland, TX 79701		Public Charity	Children's medical clinic for low income, uninsured in Midland County	10,000.
Community Food Bank of Eastern OK 1304 N. Kenosha Avenue Tulsa, OK 74106		Public Charity	Senior Servings Program	20,000.
Community Pantry PO Box 520 Gallup, NM 87305		Public Charity	General Operations	10,000.
Community Partners of Dallas 1215 Skiles St. Dallas, TX 75204		Public Charity	Continuation of support for programs for children	20,000.
Cuidando Los Ninos (CLNKIDS) PO Box 12786 Albuquerque, NM 87195		Public Charity	Continuation of funding for general operations for day care facility for pre-school age	35,000.
Dental Care in Your Home PO Box 65310 Albuquerque, NM 87193		Public Charity	General Operations	10,000.
Divine Redeemer Presbyterian Church 407 N. Calaveras St. San Antonio, TX 78207-2807		Public Charity	Various after school programs for children of grade school age; PROGRAMS FOR CHILDREN	5,000.
Down Home Ranch 20250 FM619 Elgin, TX 78621		Public Charity	General Operations	50,000.
East Texas Food Bank PO Box 6974 Tyler, TX 75701		Public Charity	Senior Hunger Programs	25,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Easter Seals of Oklahoma 701 NE 13th St. Oklahoma City, OK 73104		Public Charity	Rehabilitative Scholarships for Adults w/ disabilities	20,000.
Eastern Oklahoma Donated Dental Services 3741 South Peoria Avenue Tulsa, OK 74105		Public Charity	For general operations	5,000.
Edmond Mobile Meals 25 W 3rd St. Edmond, OK 73003		Public Charity	For general operations	15,000.
El Paso Human Services 1001 Montana Ave. El Paso, TX 79902		Public Charity	PRIDE Center: Support services (case management) for youth transitioning from foster care	5,000.
El Pasoans Fighting Hunger 9541 Plaza Cir. El Paso, TX 79927		Public Charity	Children's backpack program	20,000.
Emergency Infant Services 222 S. Houston Ave. Tulsa, OK 74127		Public Charity	Emergency services to children (food, diapers, cribs, car seats, clothing, medicine)	30,000.
Exponent Philanthropy 1720 N Street, NW Washington, DC 20036		Public Charity	General Operations; Association of Small Foundation	2,000.
Family Eldercare 1700 Rutherford Lane Austin, TX 78754		Public Charity	Money Management program	25,000.
Flying Vikings 402 Northcliffe Dr. Belton, TX 76513		Public Charity	Plane rides for children with special medical needs (CCA)	5,000.
Food Pantry of Jeff Davis County 609 Compromise St. Fort Davis, TX 79734		Public Charity	Children's school lunch program	5,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Fort Sumner Community Development Inc. 762 N 4th Street Fort Sumner, NM 88119		Public Charity	Helping Hands for senior citizens	20,000.
Fort Worth ISD 100 N. University Dr. Fort Worth, TX 76107		Public Charity	Breakfast in the classroom start up costs	1,764.
Foster Angels of Central Texas P.O. Box 152575 Austin, TX 78715		Public Charity	Basic needs for children in Foster care	5,000.
Full Circle Life Enrichment Center 1304 Lindsey Plaza Drive Norman, OK 73071		public Charity	General Operations	25,000.
Good Samaritan Community Services 1600 Saltillo Street San Antonio, TX 78207		Public Charity	Good Sam Wimberley summer feeding program	15,000.
Good Shepherd Center P.O. Box 749 Albuquerque, NM 87103		Public Charity	general operations	40,000.
Good Shepherd Ministries of Oklahoma, Inc. 1201 N Robinson Ave. Oklahoma City, OK 73103		Public Charity	Agency provides medical and dental services to uninsured Oklahomans of all ages	10,000.
GRACE (Grapevine Relief and Community Exchange) 610 Shady Brook Dr. Grapevine, TX 76051		Public Charity	Food programs for children and seniors	5,000.
Grow SFCC Foundation 6401 Richards Ave. Santa Fe, NM 87508		Public Charity	SFCC Campus Cupboard (continuation of support)	5,000.
Guiding Eyes for the Blind 611 Grantite Springs Road Yorktown Heights, NY 10598		Public Charity	Programs for blind and visually impaired	21,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Hays County Brown Santa PO Box 1475 San Marcos, TX 78667		Public Charity	2015 Christmas Program	2,000.
Health Collaborative 1002 N Flores St. San Antonio, TX 78212		Public Charity	Vaccination program (meningitis) for high school age children	5,000.
Hearts for Hearing 3525 NW 56th St. Oklahoma City, OK 73112		public Charity	For general operations	55,000.
Helping Hand Home for Children 3804 Avenue B Austin, TX 78751		public Charity	General operations	25,000.
Helping the Aging, Needy and Disabled (HAND) 1640 B East 2ND Street, STE 200 Austin, TX 78702		Public Charity	Expansion of services into Hays Co	30,000.
Hill Country Faith Ministries 1401 Davis Lane San Marcos, TX 78666		Public Charity	Emergency funding (Labor Day floods) New van for Hill Country Christian School	30,000.
Horses, Hearts and Hands (H3) 3606 W. Michigan Ave. Midland, TX 79703		Public Charity	Therapeutic Riding program	3,000.
Horsin Around Therapeutic Riding Center PO Box 713 Belen, NM 87002		Public Charity	Therapeutic riding program for people with disabilities	5,000.
Houston Methodist Hospital Foundation P.O. Box 4384 Houston, TX 77210		Public Charity	Medical Research (Alzheimers) Dr. S. Wong	90,000.
Humble area assistance ministries P.O. Box 14051 Humble, TX 77347		Public Charity	Nutrition programs for children and seniors	20,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Interfaith Ministries 3217 Montrose Blvd. Houston, TX 77006		Public Charity	Meals on Wheels program	25,000.
Jardin de los Ninos 1300 G El Paseo pmb 272 Las Cruces, NM 88001		Public Charity	general operations	4,000.
Jefferson County Adult Day Center 3100 Gulfway Dr. Port Arthur, TX 77642		Public Charity	Adult Day Center	10,000.
Jill's House PO Box 9104 MClean, VA 22102		Public Charity	Respite care for families of children with intellectual disabilities (Austin)	5,000.
Junior League of Austin 5416 Parkcrest Suite 100 Austin, TX 78731		Public Charity	F.I.T program	25,000.
Kipp Austin Public Schools 8509 FM 969, Building 513 Austin, TX 78724		Public Charity	Breakfast in the classroom start up costs	5,000.
La Familia Medical Center 1035 Alto Street Santa Fe, NM 87501		Public Charity	Healthy Child, Initiative Dental Program	30,000.
La Vega ISD 400 E. Loop 340 Waco, TX 76705		Public Charity	Breakfast in the classroom - start up costs	4,118.
Labor of Love P.O. Box 350 Athens, TX 75751		Public Charity	For home repairs for handicapped & the indigent elderly	15,000.
LIFE Center 2101 W. Wall Street Midland, TX 79701		Public Charity	Scholarship Fund	10,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Life Message Inc. 4501 Rowlett Rd #200 Rowlett, TX 75088		Public Charity	Request for Feed the Need nutritious meal program (NE TX region)	5,000.
Life Senior Services 5950 E. 31st Street Tulsa, OK 74135		Public Charity	Adult Day Care scholarships for low income seniors	25,000.
Little Sisters of the Poor 1900 Mark Ave. Gallup, NM 87301		Public Charity	General Operations	25,000.
ManeGait Therapeutic Horsemanship 3160 N Custer Rd. McKinney, TX 75071		Public Charity	GaitWay to the Brain, therapeutic riding program	5,000.
Mary Lee Foundation PO Box 3174 Austin, TX 78764		public Charity	remodel 5 teaching kitchens for adults with intellectual and developmental disabilities	25,000.
Maverick Boys and Girls Club of Amarillo & Canyon 1923 S Lincoln St. Amarillo, TX 79109		Public Charity	Scholarships, transportation, meal, after school support for children of low income families	20,000.
Meals on Wheels Albuquerque 5901 Harper Dr. NE Albuquerque, NM 87109		Public Charity	Low Income Medical Meal Program	25,000.
Meals on Wheels Central Texas 3227 E 5th St Austin, TX 78702		Public Charity	General operations	25,000.
Meals on Wheels of Metro Tulsa 12620 E 31st St. Tulsa, OK 74146		Public Charity	Low Income Medical Meal Program	20,000.
Meals on Wheels Plus 717 N 10th St. Abilene, TX 79601		Public Charity	General Operations	25,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Medina Senior Center PO BOX 802 Hondo, TX 78861		Public Charity	Meals on Wheels Nutrition Program and/or van purchase	20,000.
Miracle Flights For Kids 2764 N. Green Valley Pkwy, #115 Green Valley, NV 89014		Public Charity	Flights for underprivileged children	5,000.
Mission Road Developmental Center 8706 Mission Rd. San Antonio, TX 78214		Public Charity	SOAR & MORE program	10,000.
Mobile Art Pprgram 1503 W. 30TH St. Austin, TX 78703		Public Charity	Art program for seniors and disabled adults Healing with Horticulture classes	5,000.
MOW Senior Services 950 Williams St Bld C Ste 200 Rockwall, TX 75087		Public Charity	General operations	20,000.
My Neighbor's Keeper 14004 Ranch Rd. 12 Wimberely, TX 78676		Public Charity	Wimberley TX Flood Relief	10,000.
Navajo Ministries 2103 W Main St. Farmington, NM 87401		Public Charity	Four corners home for children	10,000.
Neighbor For Neighbor 505 East 36th Street North Tulsa, OK 74106		Public Charity	2015 Christmas program	2,000.
Neuro Fitness Foundation 1361 W Euless Blvd #101 Euless, TX 76040		Public Charity	Adaptive exercise equipment for people with limited mobility, in wheelchairs, etc	5,000.
New Mexico Community Foundation 502 West Cordova Road, Ste 1 Santa Fe, NM 87505		Public Charity	Philanthropic First Responder Emergency Grants	10,000.
Total from continuation sheets				

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3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
New Mexico Dental Foundation PO Box 16854 Albuquerque, NM 87191		Public Charity	Donated dental services for low-income seniors and adults with disabilities; General	30,000.
New Mexico State University Foundation PO Box 3590 Las Cruces, NM 88003		Public Charity	Therapeutic Riding Program (G.O.)	3,000.
Ocate Cliffs (Divergent Labs) 3110 9th St. NW Albuquerque, NM 87107		Public Charity	Retreat for people with disabilities	5,000.
Oklahoma Foundation for the Disabled 8421 N. Walker Oklahoma City, OK 73114		Public Charity	client scholarship program	30,000.
Onion Creek Senior Citizens 420 Barton's Crossing Buda, TX 78610		Public Charity	Free meals for senior program	15,000.
Open Door Preschools 3804 Cherrywood Road Austin, TX 78722		Public Charity	Basic Needs Assistance Funds for qualified families and staff members threatened with a	5,000.
Operation Blue Santa - Austin Police PO Box 689001 Austin, TX 78768		Public Charity	2015 Christmas Program	2,000.
Parker County Committee on Aging PO Box 817 Weatherford, TX 76086		Public Charity	Meals on Wheels Program	10,000.
PATH (People Attempting To Help) 402 W. Front Street Tyler, TX 75702		Public Charity	Programs for low income seniors and children	15,000.
Paws and Stripes, Inc. 115 Montclair Dr. SE Albuquerque, NM 87108		Public Charity	Tuition assistance; Organization provides vets with assistance dogs to help with PTSD and TBI.	13,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PB&J Family Services 1101 Lopez Road Southwest Albuquerque, NM 87105		Public Charity	Support for 2 medical clinics for low income children; Preschool and health care for children	30,000.
PediPlace 502 S Old Orchard Ln #126 Lewisville, TX 75067		Public Charity	Healthcare for low income pediatric patients	15,000.
People's Community Clinic 1101 Camino La Costa Austin, TX 78752		Public Charity	Clinic relocation and expansion	250,000.
Pleasant Hills Children's Home 170 Private Rd. 292 Oakwood, TX 75855		Public Charity	Residential Children's Home	5,000.
Project MEND 5727 IH 10 West San Antonio, TX 78201		Public Charity	General operations	10,000.
Rainbow Senior Center @ Kronkosky Place 17 Old San Antonio Rd Boerne, TX 78006		Public Charity	General Operations	15,000.
RBJ Center 21 Waller Street Austin, TX 78702		Public Charity	RBJ Social Services	30,000.
Regional Food Bank of Oklahoma 3355 S. Purdue Oklahoma City, OK 73137		Public Charity	Senior Food Program	30,000.
Rio Grande Down Syndrome Network PO Box 6759 Albuquerque, NM 87197		Public Charity	Summer programs	5,000.
RONALD McDonald House Charities Of El Pasol 300 E. California Ave. El Paso, TX 79902		Public Charity	Ronald McDonald Family Rooms in El Paso, TX and Las Cruces, NM	5,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Ronald McDonald House Charities of New Mexico 1011 Yale Blvd, NE Albuquerque, NM 87106		Public Charity	Scholarships for lodging for low income families when children hospitalized	5,000.
RONALD McDonald House Charities Of San Antonio 4803 Sid Katz San Antonio, TX 78229		Public Charity	Scholarships for low income families	5,000.
Round Rock Police Dept/Operation Blue Santa 2701 N. Maya Street Round Rock, TX 78665		Public Charity	2015 Christmas Program	2,000.
Sacramento Mountains Senior Services 212 Glorietta Ave. Cloudercroft, NM 88317		Public Charity	General Operations	15,000.
Safeplace P.O. Box 19454 Austin, TX 78760		Public Charity	Programs for children	50,000.
Samaritan Counseling Center 1101 Medical Arts Ave. NE Bldg 33 Albuquerque, NM 87102		Public Charity	Mental Health Services for children and youth	5,000.
San Marcos Lion's Charities, Inc. 170 Charles Austin Dr. San Marcos, TX 78666		Public Charity	Food Distribution program	5,000.
Scheib Opportunity Center 1200 N Bishop St. San Marcos, TX 78666		Public Charity	Services to the developmentally disabled and emotionally disturbed individuals in San	5,000.
School Fuel c/o Anderson Charitable Foundation austin, TX 78746		Public Charity	General Operations	15,000.
Service Dogs Inc. 4925 Bell Springs Rd. Dripping Springs, TX 78620		Public Charity	Sponsorship of service dog to individual (s) with disabilities	5,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Seton Williamson Foundation 201 Seton Pkwy Round Rock, TX 78665		Public Charity	Project SEARCH	30,000.
Special Care, Inc. 12201 N. Western Ave. Oklahoma City, OK 73114		Public Charity	general operations	20,000.
Spring ISD 16717 Ella Blvd. Houston, TX 77090		Public Charity	Breakfast in the Classroom start up costs	5,000.
St. Jude's Ranch for Children 652 Old Bear Creek Rd. New Braunfels, TX 78132		Public Charity	Therapeutic Residential Foster Care	15,000.
St. Peter-St. Joseph Children's Home 919 Mission Rd. San Antonio, TX 78210		Public Charity	General Operations; Children's Home	15,000.
STARRY, Inc. 1301 N. Mays Round Rock, TX 78664		Public Charity	Emergency Shelter Challenge	20,000.
Sunshine Industries, Inc. 500 Park Street Southwest Ardmore, OK 73401		Public Charity	Adult day service program; General Operations; Capital Campaign	275,000.
Sustainable Food Center 1106 Clayton Lane, Ste 480-W Austin, TX 78723		Public Charity	Double Dollar Incentive Program	5,000.
Tarrant Area Food Bank 2525 Cullen Street Fort Worth, TX 76107		Public Charity	Children's Summer Feeding Program	15,000.
TEAMability 1711 N Trinity St. San Antonio, TX 78201		Public Charity	General Operations	20,000.
Total from continuation sheets				

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3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Texas Baptist Children's Home, Inc. 1301 N. Mays Round Rock, TX 78664		Public Charity	Independent Living Program	20,000.
Texas Children's Hospital (Baylor) 1919 Braeswood, Ste 5214 Houston, TX 77030-4412		Public Charity	Donald Parsons MD, PhD; Jason Yustein MD, PhD; Michelle Redell MD, PhD; Ron Bernardi MD, PhD; Ananth	245,500.
Texas School for the Deaf Foundation PO Box 42727 Austin, TX 78704		Public Charity	support for 4 TSD programs through Amplify Austin Fundraiser	5,000.
The Adoption Exchange 14232 East Evans Avenue Aurora, CO 80014		Public Charity	General Operations	5,000.
The ARC of the Capital Area 2818 San Gabriel St. Austin, TX 78705		Public Charity	Digital Media Arts Education Lab; General Operations	25,000.
The Children's Center Rehabilitation Hospital 6800 NW 39TH Expressway Bethany, OK 73008		Public Charity	Medical equipment for children's rehabilitation hospital	30,000.
The Coming Home Connection 634 Garcia Street #25 Santa Fe, NM 87505		Public Charity	Support for free and sliding scale in-home care and respite for uninsured, low-income seniors and adults in	25,000.
The Crisis Center 4526 University Ave, Bldg 5, Ste Ge Odessa, TX 79760 7741		Public Charity	Continued support for Angel House Family Shelter	5,000.
The Food Depot 1222 A Siler Road Santa Fe, NM 87507		Public Charity	Food 4 Kids	20,000.
The Salvation Army - Albuquerque, NM 4301 Bryn Mawr Dr. NE Albuquerque, NM 87107		Public Charity	Emergency Assistance Program	35,000.
Total from continuation sheets				

**Carl Anderson Sr and Marie Jo Anderson
Charitable Foundation**

74-6078530

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
The Salvation Army - Austin 501 E. 8th Street, P.O. Box 1000 Austin, TX 78767		Public Charity	Kids Care Connection (CORE); 2015 Christmas Program; Capital Campaign	282,000.
The Settlement Home for Children 1600 Payton Gin Rd. Austin, TX 78758		Public Charity	General Operations	25,000.
The Youth Village Resources of Dallas Foundation 1508 E. Langdon Rd. Dallas, TX 75241		Public Charity	Youth Development programs	5,000.
Toys for Tots - NM 400 Wyoming Blvd. NE Albuquerque, NM 87123		Public Charity	For 2015 Christmas program	2,000.
Toys for Tots - OK 5316 South Douglas Blvd Oklahoma City, OK 73150		Public Charity	For 2015 Christmas program	2,000.
Toys for Tots - Tulsa 1101 N. 6th Street Broken Arrow, OK 74012		Public Charity	For 2015 Christmas program	2,000.
Travis Audubon 3710 Cedar Street Austin, TX 78705		Public Charity	Accessibility Ramp, Chaetura Canyon Sanctuary	4,500.
Travis County Brown Santa Program P.O. Box 207 Austin, TX 78767		Public Charity	For 2015 Christmas program	2,000.
Triple H Equitherapy Center 789 Backhaus Road Pipe Creek, TX 78063		Public Charity	Hooves, Hearts and Heroes program (equine-assisted therapy for special ed students)	3,000.
Turning Point Center 1701 Jacquelyn Drive Houston, TX 77055		Public Charity	Bed frames with platforms	5,000.
Total from continuation sheets				

**Carl Anderson Sr and Marie Jo Anderson
Charitable Foundation**

74-6078530

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
University of New Mexico Cancer Center 1201 Camino de Salud Albuquerque, NM 87106		Public Charity	High-throuput Combination Drug Sensitivity Testing for Childhood Leukemias w/CRLF2	150,000.
University of South Florida 4202 E. Fowler Avenue, ALC100 Tampa, FL 33620		Public Charity	Cancer research, (research to stop the proliferation of cancer cells in the brain)	10,000.
Upbring (formerly Lutheran Social Services of the South, Inc.) 8305 Cross Park Drive Austin, TX 78754		Public Charity	Statewide (TX) Therapeutic Foster Care progra	20,000.
Village Learning & Achievement Center 3819 Plum Valley Dr. Kingwood, TX 77339		Public Charity	General operations	20,000.
Vita-Living, Inc 3300 S Gessner Rd. #150 Houston, TX 77063		Public Charity	General operations	15,000.
Volunteer Interfaith Caregivers - Southwest 5001 Bellaire Blvd. Bellaire, TX 77401		Public Charity	Free transportation services for seniors, handicapped	6,000.
Total from continuation sheets				

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

Name of Recipient - Cuidando Los Ninos (CLNKIDS)

Continuation of funding for general operations for
day care facility for pre-school age children of low
income and homeless families (challenge)

Name of Recipient - Emergency Infant Services

Emergency services to children (food, diapers,
cribs, car seats, clothing, medicine, etc)

Name of Recipient - Hill Country Faith Ministries

Emergency funding (Labor Day floods)

New van for Hill Country Christian School

School flood damage repair

Name of Recipient - Mobile Art Pprgram

Art program for seniors and disabled adults

Healing with Horticulture classes at the RBJ Center

Name of Recipient - New Mexico Dental Foundation

Donated dental services for low-income seniors and adults with
disabilities; General Operations

Name of Recipient - Open Door Preschools

Basic Needs Assistance Funds for qualified families
and staff members threatened with a financial
emergency

Name of Recipient - Scheib Opportunity Center

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

Services to the developmentally disabled and emotionally disturbed
individuals in San Marcos/Hays County TX area

Name of Recipient - Texas Children's Hospital (Baylor)

Donald Parsons MD, PhD; Jason Yustein MD, PhD; Michelle Redell MD, PhD;

Ron Bernardi MD, PhD; Ananth Annapragada PhD; Rachael Rau MD

Collaboration with Gillson/Laungenbaugh Fdn

Name of Recipient - The Coming Home Connection

Support for free and sliding scale in-home care and respite for
uninsured, low-income seniors and adults in Santa Fe; general
operations

Name of Recipient - University of New Mexico Cancer Center

High-throuput Combination Drug Sensitivity Testing for Childhood

Leukemias w/CRLF2 Rearrangements

(Harvey, Chen, DVM, Willman); Targeting Granulocyte Colony-Stimulating

Factor for Treatment of Colorectal Cancer Metastasis (Beswick, Morris);

Matrix Mimicking Polymers for Hematopoietic Stem and Leukemia Cells

(Chigaev, Sklar)

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Interest Income - Excelsior Private Market Funds II	0.	2.	
Interest Income - Excelsior Private Market Funds III	0.	2.	
Interest Income- US Trust	133,143.	133,143.	
Total to Part I, line 3	133,143.	133,147.	

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Dividend Income - Lazard Ltd.	3,495.	0.	3,495.	3,495.	
Dividend Income - US Trust	1,247,254.	0.	1,247,254.	1,247,254.	
To Part I, line 4	1,250,749.	0.	1,250,749.	1,250,749.	

Form 990-PF Other Income Statement 3

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Oil & Gas Royalty Income	682,615.	682,615.	
Other income - Excelsior Private Market Fund II	0.	40,623.	
Other income - Excelsior Private Market Fund III	0.	23,007.	
Total to Form 990-PF, Part I, line 11	682,615.	746,245.	

Form 990-PF	Accounting Fees	Statement	4
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Tax Review Fee - BOA	2,675.	0.		2,675.
Accounting	23,814.	0.		23,814.
To Form 990-PF, Pg 1, ln 16b	26,489.	0.		26,489.

Form 990-PF	Other Professional Fees	Statement	5
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Payroll Fees	5,016.	0.		5,016.
investment management fees	52,721.	52,721.		0.
Other investment fee	3,007.	3,007.		0.
Other professional fee	5,094.	0.		5,094.
To Form 990-PF, Pg 1, ln 16c	65,838.	55,728.		10,110.

Form 990-PF	Taxes	Statement	6
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Foreign Taxes	22,666.	22,666.		0.
Foreign Taxes on Qualified	10,724.	10,724.		0.
Foreign Taxes on Non-Qualified	8,004.	8,004.		0.
Employer Payroll taxes	25,518.	0.		25,518.
Excise Tax	218,000.	0.		0.
PROPERTY TAXES	535.	0.		535.
O&G Ad Valorem Taxes	55,006.	55,006.		0.
To Form 990-PF, Pg 1, ln 18	340,453.	96,400.		26,053.

Form 990-PF	Other Expenses		Statement	7
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Website Contract/ Maint.	509.	0.		509.
Insurance	12,599.	0.		12,599.
Seminar fees	1,481.	0.		1,481.
Other royalty expense	111.	111.		0.
Software Expense	9,015.	0.		9,015.
Business Development	5,930.	0.		5,930.
Partnership - Portfolio				
Deductions	21.	19,373.		0.
workers' compensation				
insurance	857.	0.		857.
Dues, subscriptions	543.	0.		543.
telephone & internet	5,598.	0.		5,598.
Postage	870.	0.		870.
office Expense	4,290.	0.		4,290.
small equipment	4,113.	0.		4,113.
Oil and Gas Management fees				
- BOA	-987.	-987.		0.
To Form 990-PF, Pg 1, ln 23	44,950.	18,497.		45,805.

Form 990-PF	Other Increases in Net Assets or Fund Balances	Statement	8
Description	Amount		
Mutual fund adjustment - 2014	31,110.		
Year-end sales adjustment - 2014	4,332.		
Year-end sales adjustment - 2015	12.		
Purchased accrued interest - 2014	3,040.		
Non Taxable Dividend	42,924.		
Foreign tax reclaim adjustment	408.		
Net timing difference	41,025.		
Rounding	21.		
Total to Form 990-PF, Part III, line 3	122,872.		

Form 990-PF	Other Decreases in Net Assets or Fund Balances	Statement	9
Description		Amount	
Mutual fund adjustment - 2015		11,350.	
Purchased accrued interest - 2015		3,122.	
Basis adjustment - sales		35,578.	
Basis adjustment - roc		36,626.	
Non taxable Section 988 gain/loss		26,710.	
Total to Form 990-PF, Part III, line 5		113,386.	

Form 990-PF	Corporate Stock	Statement	10
Description	Book Value	Fair Market Value	
Corporate Stock	54,980,780.	57,758,656.	
Total to Form 990-PF, Part II, line 10b	54,980,780.	57,758,656.	

Form 990-PF	Corporate Bonds	Statement	11
Description	Book Value	Fair Market Value	
Corporate bonds	5,241,699.	5,206,939.	
Total to Form 990-PF, Part II, line 10c	5,241,699.	5,206,939.	

Form 990-PF	Other Investments	Statement	12
Description	Valuation Method	Book Value	Fair Market Value
Real Estate Investments	COST	2,846,450.	3,287,797.
Private Equity	COST	1,410,000.	1,759,116.
Mineral Interests/commodities	COST	1.	3,137,923.
Hedge Fund	COST	4,870,808.	4,822,489.
Total to Form 990-PF, Part II, line 13		9,127,259.	13,007,325.

Form 990-PF Depreciation of Assets Not Held for Investment Statement 13

Description	Cost or Other Basis	Accumulated Depreciation	Book Value
Breakroom Table SE	317.	317.	0.
FILE CABINET	420.	420.	0.
FURNITURE & FIXTURES	5,684.	5,481.	203.
BIZ PHONE SYSTEM	2,093.	2,093.	0.
LANIER DIG LD122 C	5,092.	5,092.	0.
COMPUTER	4,738.	4,738.	0.
PRINTER	1,463.	1,463.	0.
COMPUTER	2,400.	2,400.	0.
Desk-Sherrill	3,004.	3,004.	0.
Desk-Cate	3,222.	3,222.	0.
Desk-Brad	3,649.	3,649.	0.
Desk-Jennifer	3,145.	3,145.	0.
Conference table	2,390.	2,390.	0.
Love seat-Brad	1,750.	1,750.	0.
Reception chairs	2,630.	2,630.	0.
Computer-Brad	1,599.	1,599.	0.
Office appliance	318.	318.	0.
computER	1,599.	1,268.	331.
Total To Fm 990-PF, Part II, ln 14	45,513.	44,979.	534.

Form 990-PF

Part VIII - List of Officers, Directors
Trustees and Foundation Managers

Statement 14

Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan Expense Contrib Account	
Jennifer Bird 114 W. 7th Street, Suite 1200 Austin, TX 78701	Trustee/Chairman of Board 30.00	40,000.	0.	0.
R. Russell Rager 114 W. 7th Street, Suite 1200 Austin, TX 78701	Trustee/Vice Chairman 5.00	30,000.	0.	0.
Carl C. Anderson III 114 W. 7th Street, Suite 1200 Austin, TX 78701	Trustee 5.00	20,000.	0.	0.
Bradford H. Robb 114 W. 7th Street, Suite 1200 Austin, TX 78701	Executive Director 40.00	249,132.	10,847.	0.
Bank of America, N.A. 901 Main St, Fl 19 Dallas, TX 75202-3714	Trustee 1.00	324,336.	0.	0.
Clark Lutz 114 W. 7th Street, Suite 1200 Austin, TX 78701	Trustee effective 11/11/15 5.00	0.	0.	0.
Totals included on 990-PF, Page 6, Part VIII		663,468.	10,847.	0.

General Explanation

Statement 15

Form/Line Identifier and Description/Return Reference

Form 990-PF - Part VIII, Line 1(B) - Avg. hrs/week devoted to position:

Explanation:

The compensation shown on the return that is paid to Bank of America, N.A. as a corporate trustee is not calculated based upon an hourly rate for time spent by the trustee; rather, Bank of America's compensation as corporate trustee is calculated using a market value fee schedule. The trust officer's time spent performing administrative responsibilities for this Foundation averages one hour per week. In addition, time is spent by other staff members for recordkeeping, investment management, income collection, rendering statements and accountings, regulatory reporting, regulatory compliance and tax services.

2015 DEPRECIATION AND AMORTIZATION REPORT

Form 990-PF Page 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction*
1	Breakroom Table SE	010605SL		7.00	17	317.			317.	317.		0.
2	FILE CABINET	021605SL		7.00	17	420.			420.	420.		0.
3	FURNITURE & FIXTURES	070109SL		7.00	17	5,684.		2,842.	2,842.	2,233.		406.
4	BIZ PHONE SYSTEM	010105SL		5.00	17	2,093.			2,093.	2,093.		0.
5	LANIER DIG LD122 C	042505SL		5.00	17	5,092.			5,092.	5,092.		0.
6	COMPUTER	041407SL		5.00	17	4,738.			4,738.	4,738.		0.
7	PRINTER	030708SL		5.00	17	1,463.		732.	731.	731.		0.
8	COMPUTER	070109SL		5.00	17	2,400.		1,200.	1,200.	1,200.		0.
11	Desk-Sherrill	083011SL		7.00	17	3,004.		3,004.				0.
12	Desk-Cate	083011SL		7.00	17	3,222.		3,222.				0.
13	Desk-Brad	083011SL		7.00	17	3,649.		3,649.				0.
14	Desk-Jennifer	083011SL		7.00	17	3,145.		3,145.				0.
15	Conference table	083011SL		7.00	17	2,390.		2,390.				0.
16	Love seat-Brad	122111SL		7.00	17	1,750.		1,750.				0.
17	Reception chairs	122111SL		7.00	17	2,630.		2,630.				0.
18	Computer-Brad	061711SL		5.00	17	1,599.		1,599.				0.
19	Office appliance	051710SL		5.00	16	318.		159.	159.	159.		0.
20	COMPUTER	061710SL		5.00	16	1,599.		800.	799.	388.		80.

528102
04-01-15

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

2015 DEPRECIATION AND AMORTIZATION REPORT

Form 990-PF Page 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction*
	* Total 990-PF Pg 1 Depr					45,513.		27,122.	18,391.	17,371.	0.	486.

528102
04-01-15

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction