



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



EXTENDED TO MAY 15, 2017
Return of Private Foundation

Form 990-PF

Department of the Treasury
Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public.

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

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning OCT 1, 2015, and ending SEP 30, 2016

Name of foundation: **THE JACKSON FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address): **5773 WOODWAY**

Room/suite: **153**

City or town, state or province, country, and ZIP or foreign postal code: **HOUSTON, TX 77057**

A Employer identification number: **76-0554322**

B Telephone number: **713-850-9033**

C If exemption application is pending, check here

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

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

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

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

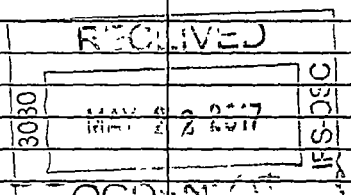
H Check type of organization:
 Section 501(c)(3) exempt private foundation
 Section 4947(a)(1) nonexempt charitable trust
 Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16): **\$ 1,542,147.**

J Accounting method:
 Cash
 Accrual
 Other (specify)

Part I Analysis of Revenue and Expenses		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
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		704.	704.		STATEMENT 1
4 Dividends and interest from securities		46,068.	46,068.		STATEMENT 2
5a Gross rents		21.	21.		STATEMENT 3
b Net rental income or (loss)		21.			
6a Net gain or (loss) from sale of assets not on line 10		57,758.			
b Gross sales price for all assets on line 6a		319,004.			
7 Capital gain net income (from Part IV, line 2)			57,758.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		16,367.	16,367.		STATEMENT 4
12 Total. Add lines 1 through 11		120,918.	120,918.		
13 Compensation of officers, directors, trustees, etc		600.	360.		240.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 5		375.	188.		187.
b Accounting fees STMT 6		5,685.	2,843.		2,842.
c Other professional fees STMT 7		58,708.	34,920.		23,788.
17 Interest		38.	38.		0.
18 Taxes STMT 8		1,304.	1,304.		0.
19 Depreciation and depletion		146.	146.		
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 9		2,484.	1,295.		1,189.
24 Total operating and administrative expenses. Add lines 13 through 23		69,340.	41,094.		28,246.
25 Contributions, gifts, grants paid		82,350.			82,350.
26 Total expenses and disbursements. Add lines 24 and 25		151,690.	41,094.		110,596.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<30,772.>			
b Net investment income (if negative, enter -0-)			79,824.		
c Adjusted net income (if negative, enter -0-)				N/A	

SCANNED MAY 24 2017



1 924

20

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	53,989.	37,088.	37,088.
	2 Savings and temporary cash investments	24,867.	34,800.	34,800.
	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			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other	STMT 11 1,237,694.	1,211,727.	1,470,191.	
14 Land, buildings, and equipment: basis ▶	2,909.			
Less accumulated depreciation	STMT 12 ▶ 2,841.	214.	68.	
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	1,316,764.	1,283,683.	1,542,147.	
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			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	1,316,764.	1,283,683.	
	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	1,316,764.	1,283,683.		
31 Total liabilities and net assets/fund balances	1,316,764.	1,283,683.		

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	1,316,764.
2 Enter amount from Part I, line 27a	2	<30,772.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,285,992.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 10	5	2,309.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,283,683.

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			
b SEE ATTACHED STATEMENT			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 319,004.		261,246.	57,758.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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			
b			
c			
d			
e			57,758.

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	57,758.
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	100,638.	1,790,397.	.056210
2013	50,181.	1,837,780.	.027305
2012	81,571.	1,708,868.	.047734
2011	82,353.	1,597,987.	.051535
2010	73,652.	1,545,583.	.047653

2 Total of line 1, column (d)	2	.230437
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	.046087
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	1,575,128.
5 Multiply line 4 by line 3	5	72,593.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	798.
7 Add lines 5 and 6	7	73,391.
8 Enter qualifying distributions from Part XII, line 4	8	110,596.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <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	798.
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	798.
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	798.
6	Credits/Payments:		
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	900.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	900.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	23.
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	79.
11	Enter the amount of line 10 to be: Credited to 2016 estimated tax 79. Refunded	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a	X	
4b	X	
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		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>HTTP://WWW.THEJACKSONFOUNDATION.ORG</u>	X	
14 The books are in care of ► <u>CAROL DEASON</u> Telephone no. ► <u>713-850-9033</u> Located at ► <u>5773 WOODWAY, SUITE 153, HOUSTON, TX</u> ZIP+4 ► <u>77057</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

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)? Yes No
 Organizations relying on a current notice regarding disaster assistance check here N/A

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). N/A

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? Yes 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? Yes 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.

(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 13		600.	0.	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
NONE				

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

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

3 Five highest-paid independent contractors for professional services. 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.

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	1,533,025.
b	Average of monthly cash balances	1b	66,090.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,599,115.
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	1,599,115.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	23,987.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,575,128.
6	Minimum investment return. Enter 5% of line 5	6	78,756.

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	78,756.
2a	Tax on investment income for 2015 from Part VI, line 5	2a	798.
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	798.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	77,958.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	77,958.
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	77,958.

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	110,596.
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	110,596.
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	798.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	109,798.

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				77,958.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			51,374.	
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: ▶ \$ 110,596.				
a Applied to 2014, but not more than line 2a			51,374.	
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				59,222.
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				18,736.
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				

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

N/A

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

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
	(a) 2015	(b) 2014	(c) 2013	
b 85% of line 2a				
c Qualifying distributions from Part XII, line 4 for each year listed				
d Amounts included in line 2c not used directly for active conduct of exempt activities				
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
3 Complete 3a, b, or c for the alternative test relied upon:				
a "Assets" alternative test - enter:				
(1) Value of all assets				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				
c "Support" alternative test - enter:				
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				
(3) Largest amount of support from an exempt organization				
(4) Gross investment income				

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

1 Information Regarding Foundation Managers:

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

NONE

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.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

SEE STATEMENT 14

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

c Any submission deadlines:

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

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 SEE STATEMENT A	P		
b SEE STATEMENT A	P		
c ENTERPRISE PRODUCTS PARTNERS, LP	P		
d THE BLACKSTONE GROUP, LP	P		
e THE BLACKSTONE GROUP, LP	P		
f ONEOK PARTNERS, LP	P	01/27/11	07/23/15
g TARGA RESOURCES PARTNERS, LP	P		07/23/15
h WILLIAMS PARTNERS, LP	P	11/15/13	07/23/15
i			
j			
k			
l			
m			
n			
o			

(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 30,517.		32,627.	<2,110.>
b 281,396.		228,609.	52,787.
c 230.			230.
d		10.	<10.>
e 2,313.			2,313.
f 219.			219.
g 3,421.			3,421.
h 908.			908.
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(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			<2,110.>
b			52,787.
c			230.
d			<10.>
e			2,313.
f			219.
g			3,421.
h			908.
i			
j			
k			
l			
m			
n			
o			

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	57,758.
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

CYPRESS ASSET MANAGEMENT, INC.
REALIZED GAINS AND LOSSES
THE JACKSON FOUNDATION
Schwab A/C 8767-8241
From 10-01-15 Through 09-30-16

Open Date	Close Date	Quantity	Security	Cost Basis	Proceeds	Gain Or Loss	
						Short Term	Long Term
05-22-13	10-01-15	0 7500	PJT PARTNERS	12	15		3
07-23-15	11-10-15	0 6667	FOUR CORNERS PROPERTY TRUST	16	14	-2	
03-06-02	11-18-15	300 0000	QUALCOMM	5,978	14,376		8,398
03-06-02	11-18-15	100 0000	QUALCOMM	1,993	4,792		2,799
03-06-02	11-18-15	100 0000	QUALCOMM	1,993	4,792		2,799
05-22-13	12-07-15	43 0000	PJT PARTNERS	706	986		280
05-26-10	03-24-16	0 4472	CALIFORNIA RESOURCES	1	0		0
05-26-10	04-05-16	18 2764	CALIFORNIA RESOURCES	24	16		-8
05-28-13	04-05-16	18 7236	CALIFORNIA RESOURCES	29	16		-13
07-23-15	04-25-16	32 6667	FOUR CORNERS PROPERTY TRUST	796	569	-227	
07-23-15	04-25-16	33 3333	FOUR CORNERS PROPERTY TRUST	812	581	-231	
07-23-15	04-25-16	33 3333	FOUR CORNERS PROPERTY TRUST	812	581	-231	
07-23-15	04-25-16	41 6667	FOUR CORNERS PROPERTY TRUST	1,015	726	-289	
03-02-16	04-25-16	51 0000	FOUR CORNERS PROPERTY TRUST	828	889	60	
05-26-10	04-28-16	100 0000	OCCIDENTAL PETROLEUM	7,723	7,670		-53
10-23-03	04-28-16	300 0000	ENTERPRISE PDCTS PARTNERS	3,222	8,109		4,888
05-27-09	04-28-16	100 0000	ROYAL DUTCH CL A	5,224	5,330		106
07-23-15	05-04-16	100 0000	DARDEN RESTAURANTS	6,671	6,390	-281	
07-23-15	05-04-16	100 0000	DARDEN RESTAURANTS	6,670	6,390	-281	
07-23-15	05-04-16	100 0000	DARDEN RESTAURANTS	6,670	6,390	-281	
07-23-15	05-04-16	125 0000	DARDEN RESTAURANTS	8,338	7,987	-351	
03-03-15	05-04-16	1,000 0000	ASTRAZENECA	34,168	28,294		-5,874
05-26-10	05-04-16	100 0000	OCCIDENTAL PETROLEUM	7,723	7,469		-254
05-04-04	05-04-16	99 0000	EMERSON ELECTRIC	2,942	5,212		2,269
05-04-04	05-04-16	100 0000	EMERSON ELECTRIC	2,972	5,264		2,292
05-04-04	05-04-16	1 0000	EMERSON ELECTRIC	30	53		23
02-01-05	05-04-16	99 0000	EMERSON ELECTRIC	3,387	5,212		1,825
09-01-06	05-04-16	226 0000	KINDER MORGAN INC	4,538	3,836		-702
02-01-05	05-04-16	1 0000	EMERSON ELECTRIC	34	53		18
03-03-15	05-04-16	700 0000	GLAXOSMITHKLINE	33,361	29,677		-3,684
02-01-05	05-04-16	200 0000	EMERSON ELECTRIC	6,842	10,528		3,686
01-27-11	05-04-16	100 0000	PLAINS ALL AMERICAN	3,244	2,108		-1,136
01-27-11	05-04-16	100 0000	PLAINS ALL AMERICAN	3,244	2,108		-1,136
01-27-11	05-04-16	100 0000	PLAINS ALL AMERICAN	3,244	2,108		-1,136
01-27-11	05-04-16	100 0000	PLAINS ALL AMERICAN	3,244	2,108		-1,136
01-27-11	05-04-16	100 0000	PLAINS ALL AMERICAN	3,244	2,108		-1,136
01-27-11	05-04-16	58 0000	PLAINS ALL AMERICAN	1,882	1,223		-659
01-27-11	05-04-16	42 0000	PLAINS ALL AMERICAN	1,363	885		-477
01-27-11	05-04-16	100 0000	PLAINS ALL AMERICAN	3,244	2,108		-1,136
01-27-11	05-04-16	100 0000	PLAINS ALL AMERICAN	3,244	2,108		-1,136
02-01-05	06-07-16	300 0000	EMERSON ELECTRIC	10,263	16,081		5,818

STATEMENT A

CYPRESS ASSET MANAGEMENT, INC.
REALIZED GAINS AND LOSSES
THE JACKSON FOUNDATION
Schwab A/C 8767-8241
From 10-01-15 Through 09-30-16

Open Date	Close Date	Quantity	Security	Cost Basis	Proceeds	Gain Or Loss		
						Short Term	Long Term	
05-04-05	06-07-16	200 0000	EMERSON ELECTRIC	6,669	10,721		4,052	
02-03-11	06-07-16	200 0000	EATON CORP	10,852	12,533		1,681	
01-07-00	09-06-16	100 0000	JOHNSON&JOHNSON	4,847	11,971		7,124	
09-13-11	09-06-16	200 0000	COCA COLA	6,929	8,721		1,792	
03-06-01	09-06-16	200 0000	EXXON MOBIL	8,376	17,663		9,287	
08-19-15	09-06-16	700 0000	BLUE BUFFALO PET PRODUCTS	19,385	18,086		-1,299	
01-15-04	09-06-16	100 0000	CHEVRON	4,243	10,197		5,954	
12-06-05	09-06-16	100 0000	DIAGEO	6,039	11,467		5,428	
10-23-03	09-06-16	100 0000	ENTERPRISE PDCTS PARTNERS	1,074	2,695		1,622	
10-23-03	09-06-16	100 0000	ENTERPRISE PDCTS PARTNERS	1,074	2,696		1,622	
TOTAL GAINS							60	73,766
TOTAL LOSSES							-2,175	-20,975
TOTAL REALIZED GAIN/LOSS 50,677				261,237	311,913	-2,114	52,791	

THE JACKSON FOUNDATION
 PART XV SUPPLEMENTARY INFORMATION (CONTINUED)

76-0554322

LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR 10/01/15-9/30/16

RECIPIENT NAME AND ADDRESS	RELATIONSHIP	FOUNDATION STATUS	PURPOSE OF CONTRIBUTION	AMOUNT
SMALL STEPS NURTURING CENTER 1709 DEPELCHIN HOUSTON, TX 77007	NONE		EDUCATIONAL	5,000
NEWSRING 8945 LONG POINT RD , STE 100 HOUSTON, TX 77055	NONE		CHARITABLE	5,000
THE BEACON 1117 TEXAS AVE HOUSTON, TX 77002	NONE		HEALTH	5,000
ODYSSEY HOUSE TEXAS 5629 GRAPEVINE HOUSTON, TX 77085	NONE		HEALTH	3,000
ARCHWAY ACADEMY P O BOX 4356 HOUSTON, TX 77210-4356	NONE		EDUCATION	10,000
CHILD ADVOCATES, INC 3701 KIRBY STE 400 HOUSTON, TX 77098	NONE		CHARITABLE	6,600
NORTHWEST ASSISTANCE MINISTRIES 15555 KUYKENDALE RD HOUSTON, TX 77090	NONE		CHARITABLE	3,500
HOPE AND HEALING CENTER 717 SAGE RD HOUSTON, TX 77057	NONE		EDUCATIONAL	5,000
VALOR CHRISTIAN HIGH SCHOOL 3775 GRACE BLVD HIGHLANDS RANCH, CO 80126	NONE		EDUCATIONAL	500
HUNT VOLUNTEER FIRE DEPARTMENT P O BOX 362 HUNT, TX 78024	NONE		CHARITABLE	3,000
ALLIANCE OF COMMUNITY ASSISTANCE MINISTRIES 710 POST OAK RD, STE 210 HOUSTON, TX 77024	NONE		CHARITABLE	2,500
TEXAS 4000 FOR CANCER 901 S MOPAC EXPRESSWAY BARTON OAKS PLAZA ONE, STE 300 AUSTIN, TX 78746	NONE		HEALTH	1,000
COVENANT HOUSE TEXAS 1111 LOVETT BLVD HOUSTON, TX 77006	NONE		CHARITABLE	3,000

THE JACKSON FOUNDATION

76-0554322

PART XV SUPPLEMENTARY INFORMATION (CONTINUED)

LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR 10/01/15-9/30/16

RECIPIENT NAME AND ADDRESS	RELATIONSHIP	FOUNDATION STATUS	PURPOSE OF CONTRIBUTION	AMOUNT
CHINQUAPIN PREPARATORY SCHOOL 2615 WALLISVILLE RD HIGHLANDS, TX 77562	NONE		EDUCATIONAL	5,000
BOYS AND GIRLS COUNTRY 18806 ROBERTS RD HOCKLEY, TX 77447	NONE		CHARITABLE	5,000
CASA DE ESPERANZA P O BOX 66581 HOUSTON, TX 77266-6581	NONE		CHARITABLE	5,000
ESCAPE FAMILY RESOURCE CENTER 2410 HAMILTON ST HOUSTON, TX 77004	NONE		CHARITABLE	5,000
UNIVERSITY OF HOUSTON COUGARS IN RECOVERY 5000 GULF FREEWAY BUILDING 1, ROOM 300 HOUSTON, TX 77204-2013	NONE		HEALTH & EDUCATIONAL	2,500
THE PARISH SCHOOL 1100 HAMMERLY BLVD HOUSTON, TX 77042	NONE		EDUCATIONAL	1,500
EXPONENT PHILANTHROPY 1720 N STREET, NW WASHINGTON, DC 20036	NONE		CHARITABLE	250
SIRE FORT BEND 2100 PRESTON ST RICHMOND, TX 77469	NONE		HEALTH	5,000
TOTAL				82,350

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	704.	704.	
TOTAL TO PART I, LINE 3	704.	704.	

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
CYPRESS ASSET MGMT INVESTMENTS	46,068.	0.	46,068.	46,068.	
TO PART I, LINE 4	46,068.	0.	46,068.	46,068.	

FORM 990-PF RENTAL INCOME STATEMENT 3

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
THE BLACKSTONE GROUP LP	1	29.
WILLIAMS PARTNERS LP	2	<8.>
TOTAL TO FORM 990-PF, PART I, LINE 5A		21.

FORM 990-PF OTHER INCOME STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ORDINARY INCOME FROM MAGELLAN MIDSTREAM PARTNERS, L.P.	347.	347.	
THE BLACKSTONE GROUP, L.P.	14.	14.	
ORDINARY INCOME FROM THE BLACKSTONE GROUP, L.P.	408.	408.	
ORDINARY INCOME FROM THE BLACKSTONE GROUP, L.P.	296.	296.	

ORDINARY INCOME FROM PLAINS ALL AMERICAN PIPELINE, L.P.	10.	10.
SUSPENDED LOSSES ALLOWED FROM PLAINS ALL AMERICAN PIPELINE, L.P.	<10.>	<10.>
ORDINARY INCOME FROM ENTERPRISE PRODUCTS PARTNERS, L.P.	1,068.	1,068.
SUSPENDED LOSSES ALLOWED FROM ENTERPRISE PRODUCTS PARTNERS LP	<1,068.>	<1,068.>
ORDINARY INCOME FROM ONEOK PARTNERS, LP	32,465.	32,465.
SUSPENDED LOSSES ALLOWED FROM ONEOK PARTNERS, LP	<20,291.>	<20,291.>
ORDINARY INCOME FROM TARGA RESOURCES PARTNERS LP	9,746.	9,746.
SUSPENDED LOSSES ALLOWED FROM TARGA RESOURCES PARTNERS LP	<7,381.>	<7,381.>
ORDINARY INCOME FROM WILLIAMS PARTNERS, LP	3,777.	3,777.
ORDINARY INCOME FROM ACCESS MIDSTREAM PARTNERS, LP	<178.>	<178.>
SUSPENDED LOSSES ALLOWED FROM ACCESS MIDSTREAM PARTNERS, LP	<2,836.>	<2,836.>
ORDINARY INCOME FROM ENTERPRISE PRODUCTS PARTNERS, L.P.	3,591.	3,591.
SUSPENDED LOSSES ALLOWED FROM ENTERPRISE PRODUCTS PARTNERS LP	<3,591.>	<3,591.>
ORDINARY INCOME FROM PLAINS ALL AMERICAN PIPELINE, L.P.	<1,356.>	<1,356.>
DISALLOWED LOSS FROM PLAINS ALL AMERICAN PIPELINE, L.P.	1,356.	1,356.
TOTAL TO FORM 990-PF, PART I, LINE 11	16,367.	16,367.

FORM 990-PF

LEGAL FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	375.	188.		187.
TO FM 990-PF, PG 1, LN 16A	375.	188.		187.

FORM 990-PF ACCOUNTING FEES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	5,685.	2,843.		2,842.
TO FORM 990-PF, PG 1, LN 16B	5,685.	2,843.		2,842.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	11,036.	11,036.		0.
ADR FEES	116.	106.		10.
BOOKKEEPING	47,556.	23,778.		23,778.
TO FORM 990-PF, PG 1, LN 16C	58,708.	34,920.		23,788.

FORM 990-PF TAXES STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	228.	228.		0.
FEDERAL TAX	1,076.	1,076.		0.
TO FORM 990-PF, PG 1, LN 18	1,304.	1,304.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 9
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TRAVEL EXPENSE	29.	15.		14.
COMPUTER INTERNET	863.	432.		431.
MEMBERSHIPS	750.	375.		375.
OFFICE EXPENSE	296.	148.		148.
MISCELLANEOUS FEE	36.	18.		18.
ROYALTY EXPENSES	9.	9.		0.
PORTFOLIO DEDUCTIONS	34.	34.		0.
OFFICE SUPPLIES	171.	86.		85.
CASH CONTRIBUTIONS FROM PASSTHROUGHS	5.	5.		0.
POSTAGE & DELIVERY	204.	102.		102.
OTHER DEDUCTIONS	55.	55.		0.
SOFTWARE EXPENSE	32.	16.		16.
TO FORM 990-PF, PG 1, LN 23	2,484.	1,295.		1,189.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 10
DESCRIPTION		AMOUNT
UNREALIZED LOSSES		905.
NONDEDUCTIBLE EXPENSES		57.
DISALLOWED PASSIVE LOSSES		1,347.
TOTAL TO FORM 990-PF, PART III, LINE 5		2,309.

FORM 990-PF	OTHER INVESTMENTS		STATEMENT 11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CYPRESS ASSET MGMT	FMV	1,013,420.	1,271,884.
ENTERPRISE PRODUCTS PARTNERS, LP	FMV	82,890.	82,890.
PLAINS ALL AMERICAN	FMV	0.	0.
MAGELLAN MIDSTREAM PARTNERS	FMV	70,740.	70,740.
THE BLACKSTONE GROUP, LP	FMV	44,677.	44,677.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,211,727.	1,470,191.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 12

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
PRINTER	541.	541.	0.
COMPUTER	2,081.	2,081.	0.
COMPUTER IMPROVEMENTS	287.	219.	68.
TOTAL TO FM 990-PF, PART II, LN 14	2,909.	2,841.	68.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 13

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
DOUGLAS BLAKE JACKSON 5773 WOODWAY, SUITE 153 HOUSTON, TX 77057	DIRECTOR 2.00	0.	0.	0.
DON BLAIR 5773 WOODWAY, SUITE 153 HOUSTON, TX 77057	DIRECTOR 1.00	0.	0.	0.
PAUL JORNAYVAZ 5773 WOODWAY, SUITE 153 HOUSTON, TX 77057	DIRECTOR 1.00	0.	0.	0.
TOM MARTIN 5773 WOODWAY, SUITE 153 HOUSTON, TX 77057	DIRECTOR 4.00	300.	0.	0.
CAROL DEASON 5773 WOODWAY, SUITE 153 HOUSTON, TX 77057	DIRECTOR 5.00	300.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		600.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

THE JACKSON FOUNDATION
5773 WOODWAY, SUITE 153
HOUSTON, TX 77057

TELEPHONE NUMBER

713-850-9033

FORM AND CONTENT OF APPLICATIONS

A WRITTEN LETTER OF INQUIRY CAN BE MADE TO THE FOUNDATION AT ANY TIME. THEY SHOULD INCLUDE THE AMOUNT AND PURPOSE OF THE GRANT, AS WELL AS GENERAL INFORMATION ON THE ORGANIZATION. IF THE LETTER OF INQUIRY INDICATES AN AREA IN WHICH THE FOUNDATION MAY BE INTERESTED IN ASSISTING, THE FOUNDATION WILL REQUEST A FORMAL PROPOSAL.

ANY SUBMISSION DEADLINES

ALL PROPOSALS ARE DUE APRIL 30TH OF EACH YEAR. AWARD DECISIONS ARE MADE EACH SEPTEMBER.

RESTRICTIONS AND LIMITATIONS ON AWARDS

INDIVIDUAL GRANTS WILL NOT EXCEED \$10,000. GRANTS MUST BE USED WITHIN ONE YEAR OF RECEIPT. GRANTS MAY NOT BE USED FOR POLITICAL ACTIVITIES, SOCIAL ACTIVITIES, ENDOWMENTS, INDIVIDUAL NEEDS, OR TO SERVICE DEBT. FURTHER, THE FOUNDATION WILL NOT AWARD GRANTS TO A SINGLE ORGANIZATION FOR MORE THAN FIVE CONSECUTATIVE YEARS.

