

Form 990-PF

C&E
927
Return of Private Foundation
 or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service
 ► Do not enter social security numbers on this form as it may be made public.
 ► Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar year 2017 or tax year beginning 06/01/17, and ending 05/31/18

Name of foundation

STUART GRIFFIN PERLITZ FOUNDATION

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

P. O. BOX 1499

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

BOERNE TX 78006

G Check all that apply

<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity
<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return
<input type="checkbox"/> Address change	<input type="checkbox"/> 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) ► \$ **1,286,090**J Accounting method Cash Accrual
 Other (specify)

(Part I, column (d) must be on cash basis)

A Employer identification number

74-6066479

B Telephone number (see instructions)

830-249-1140C 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 ► **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) (see instructions))

		(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 (attach schedule)				
2	Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	1,369	1,369		
4	Dividends and interest from securities	48,667	48,667		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	Stmt 1	-56,168		
b	Gross sales price for all assets on line 6a	7,717			
7	Capital gain net income (from Part IV, line 2)		7,230		
8	Net short-term capital gain			0	
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)	Stmt 2	-12,388		
12	Total. Add lines 1 through 11	-18,520	57,266	0	
13	Compensation of officers, directors, trustees, etc	0			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)	Stmt 3	2,575	2,575	
c	Other professional fees (attach schedule)	Stmt 4	562	562	
17	Interest				
18	Taxes (attach schedule) (see instructions)	Stmt 5	526	RECEIVED	
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (att sch)				
24	Total operating and administrative expenses.				
	Add lines 13 through 23	3,663	3,137	0	0
25	Contributions, gifts, grants paid	77,900			77,900
26	Total expenses and disbursements. Add lines 24 and 25	81,563	3,137	0	77,900
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	-100,083			
b	Net investment income (if negative, enter -0-)		54,129		
c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

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Operating and Administrative Expenses

Assets	Part II Balance Sheets	Beginning of year			End of year		
		(a) Book Value		(b) Book Value		(c) Fair Market Value	
1	Cash – non-interest-bearing						
2	Savings and temporary cash investments		51,521	31,150		31,150	
3	Accounts receivable ►						
	Less allowance for doubtful accounts ►						
4	Pledges receivable ►						
	Less allowance for doubtful accounts ►						
5	Grants receivable						
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)	0					
7	Other notes and loans receivable (att schedule) ►						
	Less allowance for doubtful accounts ►						
8	Inventories for sale or use		550	530		530	
9	Prepaid expenses and deferred charges						
10a	Investments – U S and state government obligations (attach schedule)	See Stmt 6					
b	Investments – corporate stock (attach schedule)		90,135	26,250		1,137,360	
c	Investments – corporate bonds (attach schedule)						
11	Investments – land, buildings, and equipment basis ►						
	Less accumulated depreciation (attach sch) ►						
12	Investments – mortgage loans						
13	Investments – other (attach schedule)	See Statement 7		141,010	125,203	117,050	
14	Land, buildings, and equipment basis ►						
	Less accumulated depreciation (attach sch) ►						
15	Other assets (describe ►))					
16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)		283,216	183,133		1,286,090	
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ►))	0	0		
Net Assets or Fund Balances	23	Total liabilities (add lines 17 through 22)					
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			► <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		89,875	89,875		
	28	Paid-in or capital surplus, or land, bldg , and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds		193,341	93,258		
	30	Total net assets or fund balances (see instructions)		283,216	183,133		
	31	Total liabilities and net assets/fund balances (see instructions)		283,216	183,133		

Part III.1 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	283,216
2	Enter amount from Part I, line 27a	2	-100,083
3	Other increases not included in line 2 (itemize) ►	3	
4	Add lines 1, 2, and 3	4	183,133
5	Decreases not included in line 2 (itemize) ►	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	183,133

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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 (for example, 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 RAYMOND JAMES - CGD					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))		
a 7,230			7,230		
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any			
a			7,230		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	7,230	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) See instructions If (loss), enter -0- in Part I, line 8			3		

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

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

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

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

 Yes No

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

1 Enter the appropriate amount in each column for each year, see 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))
2016	76,314	1,369,531	0.055723
2015	75,025	1,366,326	0.054910
2014	87,588	1,675,599	0.052273
2013	96,861	1,786,844	0.054208
2012	87,584	1,746,217	0.050156

2 Total of line 1, column (d) 2 0.267270

3 Average distribution ratio for the 5-year base period – divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years 3 0.053454

4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5 4 1,273,543

5 Multiply line 4 by line 3 5 68,076

6 Enter 1% of net investment income (1% of Part I, line 27b) 6 541

7 Add lines 5 and 6 7 68,617

8 Enter qualifying distributions from Part XII, line 4 8 77,900

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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I 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)	1	541
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	2	0
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of Part I, line 12, col (b)	3	541
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	0
3	Add lines 1 and 2	5	541
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	530
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	530
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	11
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ►	11	
		Refunded ►	

I Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	Yes	No
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the Instructions for the definition		
1c	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		
2	Did the foundation file Form 1120-POL for this year?		
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ► \$ _____ (2) On foundation managers ► \$ _____		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ _____		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		
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		
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		
b	If "Yes," has it filed a tax return on Form 990-T for this year?		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		
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?		
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		
8a	Enter the states to which the foundation reports or with which it is registered See instructions ►		
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		
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 2017 or the taxable year beginning in 2017? See instructions for Part XIV If "Yes," complete Part XIV		
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		

Part VII-A I Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions
 11 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
 12 X

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?
 Website address ► **N/A**
 13 X

14 The books are in care of ► **LAWRENCE, BLACKBURN, MEEK, MAXEY** Telephone no ► **409-898-7610**
 2920 EASTEX FREEWAY

Located at ► **BEAUMONT** TX ZIP+4 ► **77703**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here and enter the amount of tax-exempt interest received or accrued during the year
 15

16 At any time during calendar year 2017, 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 ► **N/A**
 16 X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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 <input type="checkbox"/> N/A <input type="checkbox"/>		
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 2017? <input type="checkbox"/> N/A <input type="checkbox"/>		
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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? If "Yes," list the years ► 20 20 20 20 <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) <input type="checkbox"/> N/A <input type="checkbox"/>		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 20 20 20 <input type="checkbox"/> N/A <input type="checkbox"/>		
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 2017 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 2017) <input type="checkbox"/> N/A <input type="checkbox"/>		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <input type="checkbox"/> 3b <input type="checkbox"/>		
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 2017? <input type="checkbox"/> 4a <input checked="" type="checkbox"/> X <input type="checkbox"/> 4b <input checked="" type="checkbox"/> 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	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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	5b	
	Organizations relying on a current notice regarding disaster assistance, check here ► <input type="checkbox"/>			
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	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JAMES R. PERLITZ P. O. BOX 1499	BOERNE TX 78006	SEC/TREAS 0.00	0	0
LEA GRIFFIN PERLITZ P. O. BOX 1499	BOERNE TX 78006	PRESIDENT 1.00	0	0

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

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

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. See instructions. 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 ►**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 (see instructions)**

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** ►Form **990-PF** (2017)

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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	1,244,370
b Average of monthly cash balances	1b	48,567
c Fair market value of all other assets (see instructions)	1c	0
d Total (add lines 1a, b, and c)	1d	1,292,937
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	1,292,937
4 Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions)	4	19,394
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,273,543
6 Minimum investment return. Enter 5% of line 5	6	63,677

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	63,677
2a Tax on investment income for 2017 from Part VI, line 5	2a	541
b Income tax for 2017 (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	541
3 Distributable amount before adjustments Subtract line 2c from line 1	3	63,136
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	63,136
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	63,136

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	77,900
b Program-related investments – total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	77,900
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b See instructions	5	541
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	77,359

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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I Part XIII I Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				63,136
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only				
b Total for prior years 20_____, 20_____, 20_____				
3 Excess distributions carryover, if any, to 2017				
a From 2012	1,223			
b From 2013	8,627			
c From 2014	4,772			
d From 2015	7,809			
e From 2016	8,889			
f Total of lines 3a through e	31,320			
4 Qualifying distributions for 2017 from Part XII, line 4 ► \$ 77,900				
a Applied to 2016, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2017 distributable amount				63,136
e Remaining amount distributed out of corpus	14,764			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:	46,084			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)	1,223			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	44,861			
10 Analysis of line 9				
a Excess from 2013	8,627			
b Excess from 2014	4,772			
c Excess from 2015	7,809			
d Excess from 2016	8,889			
e Excess from 2017	14,764			

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

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))

N/A

N/A

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

N/A

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., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

a The name, address, and telephone number or email address of the person to whom applications should be addressed
JAMES R. PERLITZ 830-249-1150

P.O. BOX 1499 BOERNE TX 78006

b The form in which applications should be submitted and information and materials they should include
See Statement 8

c Any submission deadlines

APPLICATIONS ARE ACCEPTED AT ANY TIME.

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

See Statement 9

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Part XV | Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Statement 10				77,900
Total			► 3a	77,900
b Approved for future payment N/A				
Total			► 3b	

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Part XVI-A | Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	1,369	
4 Dividends and interest from securities			14	48,667	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			14	7,230	-63,398
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b COMPRESSCO, K-1			15	-12,388	
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		44,878	-63,398
13 Total Add line 12, columns (b), (d), and (e)				13	-18,520

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Whom Sold	Description	How Received		Cost	Expense	Depreciation	Net Gain / Loss
		Date Acquired	Date Sold				
SEADRILL LTD	12/15/11 2/13/18	\$ 487	\$ 487	\$ 63,885	\$ 63,885	\$ 0	\$ -63,398
Total		\$ 487	\$ 487	\$ 63,885	\$ 63,885	\$ 0	\$ -63,398

Statement 2 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
	\$ -12,388	\$ 0	\$ 0
COMPRESSCO, K-1	\$ -12,388	\$ 0	\$ 0
Total	\$ -12,388	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net
	\$ 2,575	\$ 2,575	\$ 0
ACCOUNTING FEES	\$ 2,575	\$ 2,575	\$ 0
Total	\$ 2,575	\$ 2,575	\$ 0

Statement 4 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net
	\$ 562	\$ 562	\$ 0
Investment expenses	\$ 562	\$ 562	\$ 0
Total	\$ 562	\$ 562	\$ 0

Statement 5 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FEDERAL INCOME TAXES	\$ 526	\$ 526	\$ 0	\$ 0
Total	\$ 526	\$ 526	\$ 0	\$ 0

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
STOCKS	\$ 90,135	\$ 26,250	Cost	\$ 1,137,360
Total	\$ 90,135	\$ 26,250		\$ 1,137,360

Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
REITS/TANGIBLES	\$ 40,955	\$ 26,842	Cost	\$ 23,560
MUTUAL FUNDS	\$ 100,055	\$ 98,361	Cost	\$ 93,490
Total	\$ 141,010	\$ 125,203		\$ 117,050

Statement 8 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**Description**

A WRITTEN OR VERBAL REQUEST STATING THE PURPOSE OF THE ORGANIZATION AND HOW THE FUNDS WILL BE USED.

Form 990-PF, Part XV, Line 2c - Submission Deadlines**Description**

APPLICATIONS ARE ACCEPTED AT ANY TIME.

Statement 9 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**Description**

ONLY REQUESTS FOR SMALL LOCAL CONTRIBUTIONS WILL BE CONSIDERED.

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Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name	Address	Relationship	Status	Purpose	Amount
AID THE SILENT BOERNE TX 78006	NONE	34910 IH-10 WEST PUBLIC	ASSISTANCE FOR THE NEEDY	5,000	
ARCHDIOCESE OF SAN ANTONIO SAN ANTONIO TX 78228	NONE	2718 WEST WOODLAWN AVE PUBLIC	SUPPORT OF VARIOUS CHARITIES	4,000	
BENEDICTINE MINISTRIES BOERNE TX 78006	NONE	316 W. HIGHLAND DR PUBLIC	FINANCIAL ASSISTANCE FOR THE NEEDY	5,000	
CHRISTIAN WOMENS JOB CORPS BOERNE TX 78006	NONE	P O BOX 363 PUBLIC	TEACH JOB SKILLS	5,000	
DOMINICAN SISTERS HOUSTON TX 77021	NONE	6501 ALMEDA ROAD PUBLIC	ASSISTANCE TO THE RETIRED NUNS	5,000	
GENEVA SCHOOL OF BOERNE BOERNE TX 78015	NONE	113 CASCADE CAVERNS RD PUBLIC	SCHOLARSHIPS	2,500	
GREYSTONE PREPARATORY SCHOOL, INC KERRVILLE TX 78028	NONE	2100 MEMORIAL BLVD, PUBLIC	GRAMMAR CAMPUS CAMPAIGN	5,000	
HILL COUNTRY MISSION FOR HEALTH BOERNE TX 78006	NONE	122 COMMERCE AVE PUBLIC	HEALTH CAPITAL CAMPAIGN	4,000	
HILL COUNTRY PREGNANCY CARE CENTER BOERNE TX 78006	NONE	439 FABRA ST PUBLIC	GALA 2017 UNDERWRITING	5,000	
K-STAR KERRVILLE TX 78029	NONE	P O BOX 290962 PUBLIC	PROVIDES SUPPORT FOR ABUSED CHILDREN	1,000	
KENDALL COUNTY WOMEN'S SHELTER BOERNE TX 78006	NONE	P.O. BOX 1087 PUBLIC	SHELTER FOR WOMEN	5,000	
MSGR. KELLY HIGH SCHOOL BEAUMONT TX 77707	NONE	5950 KELLY DRIVE PUBLIC	SCHOLARSHIP	4,900	
OBLATE MISSIONS SAN ANTONIO TX 78265	NONE	P O BOX 659432 PUBLIC	EDUCATION AND BUILDING NEEDS	3,000	
OBLATE SCHOOL OF THEOLOGY SAN ANTONIO TX 78216	NONE	285 OBLATE DR PUBLIC	REFURBISH COLLEGE CHAPEL	1,000	
OUR LADY OF THE HILLS CATHOLIC HS KERRVILLE TX 78028	NONE	6011 PETERSON FARM RD PUBLIC	GENERAL EXPENSES	2,500	
SAIN PETER THE APOSTLE CATHOLIC BOERNE TX 78006	NONE	202 W KRONKSY PUBLIC	FINANCIAL SUPPORT FOR THE NEEDY	18,000	
SILSSEE HIGH SCHOOL SCHOLARSHIP SILSSEE TX 77656	NONE	415 HWY 327 WEST PUBLIC	FINANCIAL ASSISTANCE TO THE NEEDY	1,000	

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**Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)**

Name	Address	Relationship	Status	Purpose	Amount
THE CHILDREN'S INN BEAUMONT TX 78006	216 W. HIGHLAND AVE PUBLIC	NONE	EDUCATIONAL PROGRAMS FOR BOYS		1,000
Total					77,900