

INTERNAL REVENUE

EXTENDED TO NOVEMBER 15, 2019

2949132703402 9

Form 990-PF

Department of the Treasury  
Internal Revenue ServiceReturn of Private Foundation  
or Section 4947(a)(1) Trust Treated as Private FoundationDo 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.

OMB No. 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning , and ending

Name of foundation  
**CARL C ANDERSON SR AND MARIE JO ANDERSON CHARITABLE FOUNDATION**

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite  
**BANK OF AMERICA, N.A. P.O. BOX 831041**

City or town, state or province, country, and ZIP or foreign postal code  
**DALLAS, TX 75283-1041**

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

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

Fair market value of all assets at end of year (from Part II, col. (c), line 16)  
**\$ 72,756,722.**

Accounting method: ☒ Cash ☐ Accrual  
☐ Other (specify) \_\_\_\_\_

A Employer identification number  
**74-6078530**

B Telephone number  
**800-357-7094**

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 ☐

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)
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		67,107.	68,137.		STATEMENT 1
4 Dividends and interest from securities		1,434,941.	1,437,944.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		2,158,773.			
b Gross sales price for all assets on line 6a		32,634,185.			
7 Capital gain net income (from Part IV, line 2)			2,466,676.		
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		413,616.	414,134.		STATEMENT 3
12 Total. Add lines 1 through 11		4,074,437.	4,386,891.		
13 Compensation of officers, directors, trustees, etc		734,302.	186,379.		547,923.
14 Other employee salaries and wages		287,315.	0.		287,315.
15 Pension plans, employee benefits		79,202.	0.		79,202.
16a Legal fees STMT 4		39,765.	0.		39,765.
b Accounting fees STMT 5		19,282.	11,569.		7,713.
c Other professional fees STMT 6		54,477.	51,013.		3,464.
17 Interest					
18 Taxes STMT 7		115,968.	79,521.		36,447.
19 Depreciation and depletion					
20 Occupancy		51,202.	0.		51,202.
21 Travel, conferences, and meetings		29,442.	0.		29,442.
22 Printing and publications		200.	0.		200.
23 Other expenses STMT 8		62,423.	58,362.		62,387.
24 Total operating and administrative expenses. Add lines 13 through 23		1,473,578.	386,844.		1,145,060.
25 Contributions, gifts, grants paid		4,832,089.			4,832,089.
26 Total expenses and disbursements. Add lines 24 and 25		6,305,667.	386,844.		5,977,149.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-2,231,230.			
b Net investment income (if negative, enter -0-)			4,000,047.		
c Adjusted net income (if negative, enter -0-)				N/A	

**CARL C ANDERSON SR AND MARIE JO ANDERSON  
CHARITABLE FOUNDATION**

Form 990-PF (2018)

74-6078530

Page 2

**Part II Balance Sheets**

Attached schedules and amounts in the description column should be for end-of-year amounts only

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year		End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash - non-interest-bearing		82,500.	27,099.	27,099.	
	2	Savings and temporary cash investments		1,182,295.	3,409,561.	3,409,561.	
	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 9	49,347,780.	45,515,817.	51,155,506.	
	c	Investments - corporate bonds	STMT 10	8,694,165.	8,734,876.	8,685,983.	
	11	Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶						
12	Investments - mortgage loans						
13	Investments - other	STMT 11	7,242,059.	6,599,997.	9,476,112.		
14	Land, buildings, and equipment: basis ▶	45,513.					
	Less: accumulated depreciation	STMT 12 ▶	45,182.	331.	331.	331.	
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)		66,551,260.	64,289,811.	72,756,722.		
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 ▶ <input type="checkbox"/>					
		and complete lines 24 through 26, and lines 30 and 31.					
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
		Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
		and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		66,551,260.	64,289,811.		
	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		66,551,260.	64,289,811.			
31	Total liabilities and net assets/fund balances		66,551,260.	64,289,811.			

**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	66,551,260.
2 Enter amount from Part I, line 27a	2	-2,231,230.
3 Other increases not included in line 2 (itemize) ▶ NET FACTORING ADJUSTMENT	3	3,866.
4 Add lines 1, 2, and 3	4	64,323,896.
5 Decreases not included in line 2 (itemize) ▶ NET TIMING DIFFERENCE	5	34,085.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	64,289,811.

Form 990-PF (2018)

## CARL C ANDERSON SR AND MARIE JO ANDERSON

Form 990-PF (2018)

CHARITABLE FOUNDATION

74-6078530

Page 3

**Part IV Capital Gains and Losses for Tax on Investment Income****SEE ATTACHED STATEMENT**

(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			
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			
b			
c			
d			
e 32,942,088.		30,475,412.	2,466,676.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			2,466,676.

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	2,466,676.
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 doesn't 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))
2017	4,626,167.	79,206,336.	.058407
2016	4,895,010.	73,671,963.	.066443
2015	4,373,302.	82,984,390.	.052700
2014	4,298,445.	85,769,312.	.050116
2013	2,959,217.	82,556,303.	.035845

2 Total of line 1, column (d)	2	.263511
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	.052702
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	80,722,678.
5 Multiply line 4 by line 3	5	4,254,247.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	40,000.
7 Add lines 5 and 6	7	4,294,247.
8 Enter qualifying distributions from Part XII, line 4	8	5,977,149.

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 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	US TRUST - LTCG	P		
b	1250 GAIN DIVIDENDS	P		
c	SALE OF PUBLICLY TRADED SECURITIES	P		
d	OTHER INCOME - TRADE RELATED ADJUSTMENT	P		
e	LTCG - EXCELSIOR PRIVATE MARKETS FUND II	P		
f	LTCG - EXCELSIOR PRIVATE MARKETS FUND III	P		
g				
h				
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 55,087.			55,087.
b 256.			256.
c 32,578,835.		30,475,412.	2,103,423.
d 7.			7.
e 136,729.			136,729.
f 171,174.			171,174.
g			
h			
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

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			55,087.
b			256.
c			2,103,423.
d			7.
e			136,729.
f			171,174.
g			
h			
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	2,466,676.
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

**CARL C ANDERSON SR AND MARIE JO ANDERSON**  
**CHARITABLE FOUNDATION**

74-6078530

Page 4

**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	40,000.
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	40,000.
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	40,000.
6 Credits/Payments:			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	77,260.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	25,000.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	102,260.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.	
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	62,260.	
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax <input checked="" type="checkbox"/> 62,260. Refunded <input type="checkbox"/>	11	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 the 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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 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.		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
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		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?	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	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input checked="" type="checkbox"/> NM, TX		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Form 990-PF (2018)

**CARL C ANDERSON SR AND MARIE JO ANDERSON  
CHARITABLE FOUNDATION**

74-6078530

**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 ► 15 <u>N/A</u>		
16 At any time during calendar year 2018, 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 ► <input type="checkbox"/>	1b	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 2018?	1c	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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____, _____, _____		
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.) <u>N/A</u>	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____		
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 2018 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 2018.) <u>N/A</u>	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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 2018?	4b	X

Form 990-PF (2018)

**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.

☐ Yes ☒ No

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

N/A

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

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

☐ Yes ☒ No**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.**

(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		734,302.	16,135.	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
KAREN KAHAN - 114 WEST 7TH STREET, SUITE 1200, AUSTIN, TX 78701	CHIEF PROGRAM OFFICER	126,000.	0.	0.
CATHERINE SITTON - 114 WEST 7TH STREET, SUITE 1200, AUSTIN, TX 78701	GRANT MANAGER	85,082.	5,105.	0.
SHERRILL GERATY - 114 WEST 7TH STREET, SUITE 1200, AUSTIN, TX 78701	GRANT MANAGER	76,233.	4,574.	0.

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

▶ 0

Form 990-PF (2018)

(continued)

0

## 0.

2018-05000 CARL C ANDERSON SR AND MA ANDEJOINI



**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	78,237,032.
b	Average of monthly cash balances	1b	1,584,010.
c	Fair market value of all other assets	1c	2,130,915.
d	Total (add lines 1a, b, and c)	1d	81,951,957.
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	81,951,957.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,229,279.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	80,722,678.
6	Minimum investment return. Enter 5% of line 5	6	4,036,134.

**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	4,036,134.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	40,000.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	40,000.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	3,996,134.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	3,996,134.
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	3,996,134.

**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	5,977,149.
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	5,977,149.
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	40,000.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	5,937,149.

**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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				3,996,134.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			90,211.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$ 5,977,149.				
a Applied to 2017, but not more than line 2a			90,211.	
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 2018 distributable amount				3,996,134.
e Remaining amount distributed out of corpus	1,890,804.			
5 Excess distributions carryover applied to 2018 (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:	1,890,804.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				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)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	1,890,804.			
10 Analysis of line 9:				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018	1,890,804.			



CARL C ANDERSON SR AND MARIE JO ANDERSON  
CHARITABLE FOUNDATION

Form 990-PF (2018)

74-6078530 Page 11

**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
<b>a Paid during the year</b>				
A NEW LEAF PO BOX 35903 TULSA, OK 74153		PUBLIC CHARITY	GENERAL OPERATIONS	50,000.
ABRAZOS FAMILY SUPPORT SERVICES 412 CAMINO DON TOMAS BERNALILLO, NM 87004		PUBLIC CHARITY	CAPACITY BUILDING CONSULTING SERVICES	5,000.
ABRAZOS FAMILY SUPPORT SERVICES 413 CAMINO DON TOMAS BERNALILLO, NM 87005		PUBLIC CHARITY	AUTISM AFTER SCHOOL PROGRAM	10,000.
ADULTS INDEPENDENT AND MOTIVATED 7412 BLACK MOUNTAIN DR AUSTIN, TX 78736		PUBLIC CHARITY	GENERAL OPERATIONS (LUTZ)	2,000.
ALBUQUERQUE CHRISTIAN CHILDREN'S HOME, INC 5700 WINTER HAVEN DR NW ALBUQUERQUE, NM 87120		PUBLIC CHARITY	GENERAL OPERATIONS	55,000.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			<b>4,832,089.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>0.</b>

Form 990-PF (2018)

CARL C 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
ALBUQUERQUE COMMUNITY FOUNDATION 624 TIJERAS AVE NW ALBUQUERQUE, NM 87102		PUBLIC CHARITY	EMERGENCY FUND, PENNIES FOR HOMELESS PROGRAM	12,000.
ALBUQUERQUE SPEECH LANGUAGE AND HEARING CENTER 9500 MONTGOMERY BLVD NE STE 215 ALBUQUERQUE, NM 87111		PUBLIC CHARITY	HEARING AID BANK	25,000.
ALL FAITHS 1709 MOON STREET NE ALBUQUERQUE, NM 87112		PUBLIC CHARITY	GENERAL OPERATIONS, PLANNED EXPANSION	50,000.
ALTA MIRA SPECIALIZED FAMILY SERVICES, INC. 1605 CARLISLE BLVD NE ALBUQUERQUE, NM 87110		PUBLIC CHARITY	CAPACITY BUILDING	5,000.
AMARILLO WESLEY COMMUNITY CENTER 1615 S. ROBERTS ST AMARILLO, TX 79102		PUBLIC CHARITY	VAN FOR SENIOR CENTER, TRANSPORTATION PROGRAM	20,000.
ANIMAL HUMANE ASSOCIATION OF NEW MEXICO, INC. 615 VIRGINIA ST SE ALBUQUERQUE, NM 87108		PUBLIC CHARITY	CARE ASSISTANCE FOR PETS OF SENIORS	5,000.
ANN RICHARDS SCHOOL FOR YOUNG WOMEN LEADERS 2206 PRATHER LN AUSTIN, TX 78704		PUBLIC CHARITY	WEEKEND BACKPACK PROGRAM	1,000.
ANY BABY CAN, SAN ANTONIO, INC 217 HOWARD STREET SAN ANTONIO, TX 78212		PUBLIC CHARITY	ECI PROGRAM, AUTISM SERVICES	65,000.
APEX 117 S. FIRST ST ANADARKO, OK 73005		PUBLIC CHARITY	CAPACITY BUILDING (TEMPERLEY)	5,000.
ARC OF SAN ANGELO 1601 S. OAKS ST SAN ANGELO, TX 76903		PUBLIC CHARITY	GENERAL OPERATIONS	15,000.
Total from continuation sheets				4,710,089.

CARL C 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
ASSISTANCE DOGS OF THE WEST PO BOX 31027 SANTA FE, NM 87594		PUBLIC CHARITY	SCHOLARSHIPS FOR LOW INCOME CLIENTS	25,000.
AUSTIN ANGELS 9901 BRODIE LN STE 160 PMB 255 AUSTIN, TX 78748		PUBLIC CHARITY	LOVE BOX PROGRAM	5,000.
AUSTIN CHILD GUIDANCE CENTER 810 W 4TH ST AUSTIN, TX 78751		PUBLIC CHARITY	CONTINUATION OF SUPPORT FOR UNDERSERVED CHILDREN'S MENTAL HEALTH PROGRAM AND/OR SUPPORT OF	30,000.
AUSTIN COMMUNITY FOUNDATION 4312 GUADALUPE STREET #300 AUSTIN, TX 78751		PUBLIC CHARITY	VARIOUS	105,889.
AUSTIN DIAPER BANK 8711 BURNET RD STE B34 AUSTIN, TX 78757		PUBLIC CHARITY	GENERAL OPERATIONS	10,000.
AUSTIN GERIATRIC CENTER (DBA: REBEKAH BAINES JOHNSON CENTER) 21 WALLER ST AUSTIN, TX 78702		PUBLIC CHARITY	SOCIAL WORKER PROGRAM	15,000.
AUSTIN GROUPS FOR THE ELDERLY DBA AGE OF CENTRAL TEXAS 2710 CEDAR ST STE 155 AUSTIN, TX 78705		PUBLIC CHARITY	ADULT DAY HEALTH CENTER, CAPITAL CAMPAIGN	230,000.
AUSTIN INDEPENDENT SCHOOL DISTRICT 1111 W. 6TH ST. #D300 AUSTIN, TX 78702		PUBLIC CHARITY	BACK TO SCHOOL BASH	5,000.
AUSTIN POLICE P.O. BOX 689001 AUSTIN, TX 78768		PUBLIC CHARITY	2018 BLUE SANTA PROGRAM	2,000.
AUSTIN RECOVERY 4201 S CONGRESS AVE #202 AUSTIN, TX 78745		PUBLIC CHARITY	PROGRAMS FOR CHILDREN (DAY CARE)	10,000.
Total from continuation sheets				

CARL C 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
AUSTIN SUNSHINE CAMPS 2225 ANDREW ZILKER RD AUSTIN, TX 78746		PUBLIC CHARITY	FOOD PROGRAM	5,000.
BACH ECI 120 E HOSPITAL DR ANGLETON, TX 77515		PUBLIC CHARITY	EARLY CHILDHOOD INTERVENTION PROGRAM	20,000.
BETH SHALOM MINISTRIES P. O. BOX 38 STAPLES, TX 78670		PUBLIC CHARITY	2017 CHRISTMAS PROGRAM	2,500.
BETHEL COMMUNITY STOREHOUSE 3813 POB 968 MORIARTY, NM 87035		PUBLIC CHARITY	GENERAL OPERATIONS	17,000.
BLESSINGS IN A BACKPACK, INC. (BANDERA CHAPTER) 4121 SHELBYVILLE RD LOUISVILLE, KY 40207		PUBLIC CHARITY	WEEKEND BACKPACK PROGRAM FOR LOW INCOME CHILDREN IN BANDERA	22,500.
BOYS & GIRLS CLUB OF MIDLAND 1321 SOUTH GOODE ST MIDLAND, TX 79701		PUBLIC CHARITY	REPAIRS TO MIDLAND FACILITY	10,000.
BOYS & GIRLS CLUB OF THE HIGHLAND LAKES 1701 BROADWAY ST MARBLE FALLS, TX 78654		PUBLIC CHARITY	SUMMER FOOD PROGRAM	1,500.
BOYS & GIRLS CLUBS OF AUSTIN AND TRAVIS COUNTY, INC. 5407 N INTERSTATE 35 STE 400 AUSTIN, TX 78723		PUBLIC CHARITY	SUMMER PROGRAMS	20,000.
BOYS AND GIRLS CLUB OF MENARD P. O. BOX 1043 MENARD, TX 76859		PUBLIC CHARITY	GENERAL OPERATIONS/	17,500.
BOYS AND GIRLS CLUBS OF LAMESA, TX P. O. BOX 826 LAMESA, TX 79331		PUBLIC CHARITY	SCHOLARSHIPS/SUMMER PROGRAM	5,000.
Total from continuation sheets				

CARL C 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
BREAD OF LIFE PANTRY 2019 CRAWFORD ST HOUSTON , TX 77002		PUBLIC CHARITY	WALK IN FREEZER FOR PANTRY	10,000.
BRIDGE BITES (AUSTIN COMMUNITY FOUNDATION) 4315 GUADALUPE ST STE 300 AUSTIN, TX 78751		PUBLIC CHARITY	START UP COSTS	10,000.
BROOKWOOD IN GEORGETOWN 905 N CHURCH ST GEORGETOWN, TX 78626		PUBLIC CHARITY	CAPITAL CAMPAIGN 2:1	100,000.
BURKE FOUNDATION PO BOX 40 DRIFTWOOD, TX 78619		PUBLIC CHARITY	GENERAL OPERATIONS (ECL DISCRETIONARY)	3,000.
BUSBY FOUNDATION 3700 N CAPITAL OF TEXAS HIGHWAY STE 420 AUSTIN, TX 78746		PUBLIC CHARITY	SERVICES TO ASSIST ALS PATIENTS AND THEIR FAMILIES	5,000.
BYNUM SCHOOLS P. O. BOX 80175 MIDLAND, TX 79708		PUBLIC CHARITY	GENERAL OPERATIONS	25,000.
CANCER SERVICES OF NEW MEXICO PO BOX 51735 ALBUQUERQUE, NM 87181-1735		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
CARRIE TINGLEY HOSPITAL FOUNDATION 700 LOMAS BLVD NE ALBUQUERQUE, NM 87102		PUBLIC CHARITY	REVISED: FAMILY ASSISTANCE PROGRAM	25,000.
CASA DE PEREGRINOS INC 999W AMADOR, STE F LAS CRUCES, NM 88005		PUBLIC CHARITY	NUTRITION FOR SENIORS PROGRAM	25,000.
CASA ESPERANZA, DBA; HOPE HOUSE 1005 YALE NE ALBUQUERQUE, NM 87106		PUBLIC CHARITY	VAN PURCHASE	20,000.
Total from continuation sheets				



CARL C 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
CASA OF LIBERTY/CHAMBERS COUNTIES 2015 SCOUT ST LIBERTY, TX 77575		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
CATHOLIC CHARITIES OF THE TEXAS PANHANDLE 2801 DUNIVEN CIRCLE AMARILLO, TX 79109		PUBLIC CHARITY	HUNGER PROGRAM FOR SENIORS AND THOSE WITH DISABILITIES	10,000.
CATRON FOOD PANTRIES P. O. BOX 43 DATIL, NM 87821		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
CENTRAL TEXAS CHILDREN'S HOME 13200 CRANE RD. BUDA, TX 78610		PUBLIC CHARITY	GENERAL OPERATIONS	30,000.
CHAVES COUNTY JOY CENTERS 1822 N MONTANA AVENUE ROSWELL, NM 882501		PUBLIC CHARITY	GENERAL OPERATIONS	20,000.
CHILDRENS CANCER FUND OF NEW MEXICO 112 14TH ST SW ALBUQUERQUE, NM 87102		PUBLIC CHARITY	PROGRAMS FOR CHILDREN	40,000.
CHILDREN'S GRIEF CENTER OF NEW MEXICO, INC 3001 TRELIS DR NW ALBUQUERQUE, NM 87107		PUBLIC CHARITY	GENERAL OPERATIONS	10,000.
CHILDRENS HEALTH ACADEMICS & SAFETY INC P. O. BOX 15391 FORT WORTH, TX 76119		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
CHILDREN'S TUMOR FOUNDATION 370 LEXINGTON AVE STE 2100 NEW YORK, NY 10017		PUBLIC CHARITY	GENERAL OPERATIONS (ECL DISCRETIONARY)	4,000.
CHILDSAFE 7130 WEST US HWY 90 SAN ANTONIO, TX 78227		PUBLIC CHARITY	SERVICES/PROGRAMS FOR CHILDREN OF ABUSE	25,000.
Total from continuation sheets				

CARL C 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
CHRISTINA KENT EARLY CHILDHOOD CENTER 423 3RD ST SW ALBUQUERQUE, NM 87102		PUBLIC CHARITY	GENERAL OPERATIONS	25,000.
CHURCHES TOUCHING LIVES FOR CHRIST 702 W AVENUE G TEMPLE, TX 76504		PUBLIC CHARITY	GENERAL OPERATIONS	2,000.
CIBOLA SEARCH AND RESCUE P. O. BOX 11756 ALBUQUERQUE, NM 87192		PUBLIC CHARITY	GENERAL OPERATIONS	3,500.
CITY RESCUE MISSION 800 W CALIFORNIA AVE OKLAHOMA CITY, OK 73106		PUBLIC CHARITY	HOMELESS WOMEN AND CHILDREN SHELTER	15,000.
CIUDAD NUEVA 810 N CAMPBELL ST EL PASO, TX 79901		PUBLIC CHARITY	FOOD CO-OP PROGRAM	2,000.
CLARITY CHILD GUIDANCE CENTER 8535 TOM SLICK DRIVE SAN ANTONIO, TX 78229		PUBLIC CHARITY	INPATIENT MENTAL HEALTH CARE	30,000.
COMBINED COMMUNITY ACTION, INC. 165 W AUSTIN ST GIDDINGS, TX 78942		PUBLIC CHARITY	MEALS ON WHEELS PROGRAM	10,000.
COMING HOME CONNECTION 418 CERRILLOS RD 27 SANTA FE, NM 87501		PUBLIC CHARITY	GENERAL OPERATIONS	32,000.
COMMUNITIES IN SCHOOLS CENTRAL TEXAS 3000 S. IH 35 #200 AUSTIN, TX 78704		PUBLIC CHARITY	EMERGENCY CLIENT ASSISTANCE FUND	25,000.
COMMUNITY CHILDREN'S CLINIC 1101 E FRONT ST MIDLAND, TX 79701		PUBLIC CHARITY	"GENERAL OPERATIONS CHILDREN'S CLINIC FOR LOW INCOME FAMILIES"	15,000.
Total from continuation sheets				

CARL C 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
COMMUNITY FOOD BANK OF EASTERN OK 1304 N KENOSHA AVENUE TULSA, OK 74106		PUBLIC CHARITY	SENIOR SERVINGS PROGRAM	25,000.
COMMUNITY FOUNDATION OF SOUTHERN NEW MEXICO 301 S CHURCH ST STE H LAS CRUCES, NM 88001		PUBLIC CHARITY	CITY OF LAS CRUCES VOLUNTEER AND GIVING DAY MATCHING CAMPAIGN	8,000.
COMMUNITY PANTRY PO BOX 520 GALLUP, NM 87305		PUBLIC CHARITY	FOOD FOR KIDS PROGRAM (KAR DISCRETIONARY)	2,000.
COMMUNITY PARTNERS OF DALLAS 1215 SKILES ST DALLAS, TX 75204		PUBLIC CHARITY	KIDS IN CRISIS PROGRAM (CONTINUATION OF SUPPORT)	40,000.
CON MI MADRE 4175 FREIDRICH LANE STE 200 AUSTIN, TX 78744		PUBLIC CHARITY	RESOURCES FOR EL PASO STUDENTS	5,000.
COOKSON HILLS CHRISTIAN SCHOOL 60416 HIGHWAY 10 KANSAS, OK 74347		PUBLIC CHARITY	FLOOD DAMAGE REPAIR	30,000.
COURT APPOINTED SP ADVOCATES CASA OF LIBERTY CHAMBERS COUNTIES P. O. BOX 9027 LIBERTY, TX 77575		PUBLIC CHARITY	CASA VOLUNTEER TRAINING	30,000.
CREATIVE ACTION 2921 E. 17TH ST. BLDG B, BOX 7 AUSTIN, TX 78702		PUBLIC CHARITY	CONTINUING CREATIVITY PROGRAM	4,000.
CRISIS CENTER OF WEST TEXAS 910-B S GRANT ODESSA, TX 79761		PUBLIC CHARITY	PROGRAMS FOR CHILDREN	20,000.
DENTAL CARE IN YOUR HOME 1776 MONTANO RD NW ALBUQUERQUE, NM 87107		PUBLIC CHARITY	CAPACITY BUILDING	41,200.
Total from continuation sheets				

CARL C 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
DENTISTS FOR THE DISABLED AND ELDERLY IN NEED OF TREATMENT, INC. (D-DENT) 3000 UNITED FOUNDERS BLVD STE 122 OKLAHOMA CITY, OK 73112		PUBLIC CHARITY	GENERAL OPERATIONS	15,000.
DIGDEEP WATER PO BOX 26779 LOS ANGELES, CA 90026		PUBLIC CHARITY	EXPANSION OF NAVAJO WATER PROJECT IN NM	50,000.
DOMESTIC VIOLENCE INTERVENTION SERVICES, INC 3124 E APACHE ST TULSA, OK 74110		PUBLIC CHARITY	PROGRAMS FOR CHILDREN	15,000.
DOWN HOME RANCH, INC 20250 FM 619 ELGIN, TX 78621		PUBLIC CHARITY	GENERAL OPERATIONS	25,000.
DOWN SYNDROME ASSOCIATION OF SOUTH TEXAS 1127 PATRICIA SAN ANTONIO, TX 78213		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
DOWNTOWN FOOD PANTRY 124 W CHERRY ST PARIS, TX 75460		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
DRIVE A SENIOR - SENIOR ACCESS 2498 E PALM VALLEY BLVD. ROUND ROCK, TX 78665		PUBLIC CHARITY	EMERGENCY RIDES FOR OLDER ADULTS	10,000.
EASTERN OKLAHOMA DONATED DENTAL SERVICES 7060 S. YALE AVE #707 TULSA, OK 74136		PUBLIC CHARITY	GENERAL OPERATIONS	30,000.
EMERGENCY INFANT SERVICES 222 S HOUSTON AVE TULSA, OK 74127		PUBLIC CHARITY	CAPITAL CAMPAIGN - LARGER FACILITY	50,000.
ENLACE COMUNITARIO 2425 ALAMO AVE SE ALBUQUERQUE, NM 87106		PUBLIC CHARITY	"GENERAL OPERATIONS/CHILDREN'S PROGRAMS \$15,000 CHALLENGE \$15,000 STD"	30,000.
Total from continuation sheets				

CARL C 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
ENMRSH 2700 E 7TH ST CLOVIS, NM 88101		PUBLIC CHARITY	ART CLASS (RRR DISCRETIONARY)	15,000.
ESSILOR VISION FOUNDATION 13515 N. STEMMONS FWY DALLAS, TX 75234		PUBLIC CHARITY	KIDS VISION FOR LIFE, CENTRAL TEXAS	25,000.
FAMILY & CHILDREN'S SERVICES 1055 S HOUSTON AVE TULSA, OK 74127		PUBLIC CHARITY	CHILD ABUSE AND TRAUMA SERVICES	15,000.
FAMILY ELDERCARE, INC 1701 RUTHERFORD LANE AUSTIN, TX 78754		PUBLIC CHARITY	MONEY MANAGEMENT SERVICES TO SENIORS AND ADULTS W/DISABILITIES	75,000.
FAMILY PROMISE OF ALBUQUERQUE 808 EDITH BLVD NE ALBUQUERQUE, NM 87102		PUBLIC CHARITY	GENERAL OPERATIONS (RRR DISCRETIONARY)	1,500.
FAMILY PROMISE, EAST BELL COUNTY 1018 E AVENUE A TEMPLE, TX 76501		PUBLIC CHARITY	GENERAL OPERATIONS_ KR	2,000.
FAMILY SERVICE ASSOCIATION OF SAN ANTONIO, INC. 702 SAN PEDRO SAN ANTONIO, TX 78212		PUBLIC CHARITY	SUPPORT FOR MEDICAL EXPENSES FOR INFANTS, TODDLERS, PRE-SCHOOLERS IN LOW-INCOME FAMILIES	15,000.
FEED MY SHEEP 116 W AVENUE G TEMPLE, TX 76504		PUBLIC CHARITY	CHILDREN'S CLINIC KR	2,000.
FIREFLY FUND PO BOX 92616 AUSTIN, TX 78709		PUBLIC CHARITY	RESEARCH TO ACCELERATE A CURE FOR NPC (ECL DISCRETIONARY)	3,000.
FIRST CHOICE COMMUNITY HEALTHCARE 1231 CANDELARIA RD NW ALBUQUERQUE, NM 87107		PUBLIC CHARITY	FUNDRAISING PROFESSIONAL TO ASSIST WITH SOUTH VALLEY COMMON EXPANSIONREQUEST:	50,000.
Total from continuation sheets				

CARL C 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
FOSTER ANGELS OF CENTRAL TEXAS PO BOX 152575 AUSTIN, TX 78715		PUBLIC CHARITY	PROGRAMS FOR CHILDREN IN TX FOSTER CARE	15,000.
FOUNDATION COMMUNITIES 3036 S. FIRST STREET #200 AUSTIN, TX 78704		PUBLIC CHARITY	SERVICES FOR AGING VETERANS	10,000.
GERARD'S HOUSE P. O. BOX 28693 SANTA FE, NM 87592		PUBLIC CHARITY	GENERAL OPERATIONS	2,000.
GETHSEMANE LUTHERAN CHURCH 200 W ANDERSON LANE AUSTIN, TX 78752		PUBLIC CHARITY	PROGRAMS FOR SENIORS AND CHILDREN	25,000.
GOOD SAMARITAN CTR OF SAN ANTONIO 1600 SALTILLO ST. SAN ANTONIO, TX 78207		PUBLIC CHARITY	DENTAL CARE FOR SENIORS	10,000.
GOOD SHEPERD MINISTRIES OF OKLAHOMA 222 NW 12TH STREET OKLAHOMA CITY, OK 73103		PUBLIC CHARITY	CHILDREN'S DENTAL PROGRAM	15,000.
GOODWILL INDUSTRIES 1015 NORWOOD PARK BLVD. AUSTIN, TX 78753		PUBLIC CHARITY	GENERAL OPERATIONS	3,000.
GRANTMAKERS IN AGING 2001 JEFFERSON DAVIS HIGHWAY STE 504 ARLINGTON, VA 22202		PUBLIC CHARITY	ANNUAL MEMBERSHIP	1,600.
GUIDE DOGS OF TEXAS, INC. 1503 ALLENA DR SAN ANTONIO, TX 78213		PUBLIC CHARITY	GUIDE DOGS FOR VISUALLY IMPAIRED CLIENTS IN AUSTIN TX	10,000.
HAVEN HOUSE PO BOX 15611 RIO RANCHO, NM 87174		PUBLIC CHARITY	GENERAL OPERATIONS (RRR DISCRETIONARY)	2,000.
Total from continuation sheets				

CARL C 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
HAYS COUNTY BROWN SANTA PO BOX 1475 SAN MARCOS, TX 78667		PUBLIC CHARITY	2018 XMAS PROGRAM	2,000.
HELPING HAND HOME 3804 AVENUE B AUSTIN, TX 78751		PUBLIC CHARITY	GENERAL OPERATIONS	30,000.
HELPING HANDS MINISTRY PO BOX 1923 BELTON, TX 76513		PUBLIC CHARITY	HUNGER ACTION MONTH FUND DRIVE _ KR	2,000.
HILL COUNTRY DAILY BREAD MINISTRIES 234 W. BANDERA RD. #133 BOERNE, TX 78006		PUBLIC CHARITY	FAMILY MENTORING RESOURCES PROGRAM	25,000.
HILL COUNTRY FAITH MINISTRIES 1401 DAVIS LANE SAN MARCOS, TX 78666		PUBLIC CHARITY	DISASTER RELIEF/HURRICANE HARVEY	5,000.
HOME OF HOPE P. O. BOX 903 VINITA, OK 74301		PUBLIC CHARITY	GENERAL OPERATIONS	30,000.
HONOR VETERANS NOW 103 INDUSTRIAL LOOP #1050 FREDERICKSBURG, TX 78624		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
HOPE SUPPLY COMPANY 10480 SHADY TRAIL #104 DALLAS, TX 75220		PUBLIC CHARITY	HEALTHY CHILD PROGRAM	15,000.
HORSIN AROUND THERAPEUTIC RIDING CTR 207 EATON AVE SOCORRO, NM 87801		PUBLIC CHARITY	GENERAL OPERATIONS	45,000.
HOSPICE AUSTIN 4107 SPICEWOOD SPRINGS RD. #100 AUSTIN, TX 78759		PUBLIC CHARITY	GENERAL OPERATIONS	23,500.
Total from continuation sheets				

CARL C 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
HUMBLE AREA ASSISTANCE MINISTRIES P. O. BOX 14051 HUMBLE, TX 77347		PUBLIC CHARITY	DISASTER RELIEF/HURRICANE HARVEY	20,000.
I CAN STILL SHINE 3313 CRITES ST RICHLAND HILLS, TX 76118		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
ID THEFT RESOLUTIONS PO BOX 10243 ALBUQUERQUE, NM 87184		PUBLIC CHARITY	GENERAL OPERATIONS IN NEW MEXICO (RRR)	2,000.
INFANT CRISIS CENTER 4224 N. LINCOLN BLVD. OKLAHOMA CITY, OK 73105		PUBLIC CHARITY	BABY MOBILE	100,000.
LA VIDA FELICIDAD INC P. O. BOX 2040 LAS LUNAS, NM 87031		PUBLIC CHARITY	HOMECARE PROGRAM	40,000.
LEADERSHIP AUSTIN 1609 SHOAL CREEK BLVD STE 202 AUSTIN, TX 78701		PUBLIC CHARITY	PILOT: FELLOW PROGRAM (HOSPICE AUSTIN & MEALS ON WHEELS)	25,000.
LIFE ADULT DAY CENTER (ALSO LISTED AS IMPROVEMENT FOR THE ELDERLY CENTER) 411 W. MATHEWS STILLWATER, OK 74075		PUBLIC CHARITY	SCHOLARSHIP FUND FOR LOW-INCOME CLIENTS	20,000.
LIFE AT ITS BEST FOUNDATION PO BOX 4528 VICTORIA, TX 77903		PUBLIC CHARITY	G.O. (CCA)	5,000.
LIFE MESSAGE INC P. O. BOX 2087 ROWLETT, TX 75030		PUBLIC CHARITY	FEED THE NEED FOOD PROGRAM	5,000.
LIFE SENIOR SERVICES INC 5950 E. 31ST ST. TULSA, OK 74135		PUBLIC CHARITY	ADULT DAY HEALTH PROGRAM	30,000.
Total from continuation sheets				



CARL C 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
LITTLE SISTERS OF THE POOR 1900 MARK AVE. GALLUP, NM 87301		PUBLIC CHARITY	GENERAL OPERATIONS	2,000.
LOCKER #505: STUDENT'S CLOTHING BANK 6020 CONSTITUTION AVE NE ALBUQUERQUE, NM 87110		PUBLIC CHARITY	GENERAL OPERATIONS (RRR)	4,000.
LOVING THUNDER THERAPEUTIC RIDING INC P.O. BOX 44517 RIO RANCHO, NM 87174		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
LOW VISION RESOURCE CENTER 1250 NE LOOP 410 STE 630 SAN ANTONIO, TX 78209		PUBLIC CHARITY	GENERAL OPERATIONS	4,000.
LUBBOCK CHILDREN'S HEALTH CLINIC 302 N UNIVERSITY LUBBOCK, TX 79405		PUBLIC CHARITY	NURSE PRACTITIONER FOR CHILDREN'S CLINIC	25,000.
LUTHERAN SOCIAL SERVICES OF THE SOUTH, DBA UPBRING 8305 CROSS PARK DRIVE AUSTIN, TX 78754		PUBLIC CHARITY	STATEWIDE THERAPEUTIC FOSTER CARE PROGRAM	45,000.
MARBRIDGE FOUNDATION 2310 BLISS SPILLAR RD MANCHACA, TX 78652		PUBLIC CHARITY	BENEVOLENT CARE FUND	15,000.
MARC 2701 NORTH A STREET MIDLAND, TX 79705		PUBLIC CHARITY	GENERAL OPERATIONS	20,000.
MARINE TOYS FOR TOTS FOUNDATION 3837 BINZ ENGLEMAN RD SAN ANTONIO, TX 78219		PUBLIC CHARITY	2018 XMAS PROGRAM	6,000.
MARY HOUSE CATHOLIC WORKER P. O. BOX 684185 AUSTIN, TX 78768		PUBLIC CHARITY	GENERAL OPERATIONS	1,000.
Total from continuation sheets				

CARL C 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
MAVERICK BOYS & GIRLS CLUB OF AMARILLO, INC. 1923 S LINCOLN ST AMARILLO, TX 79109		PUBLIC CHARITY	FOOD PROGRAM	30,000.
MEALS ON WHEELS ALBUQUERQUE P. O. BOX 92614 ALBUQUERQUE, NM 87199		PUBLIC CHARITY	LIFE PROGRAM	25,000.
MEALS ON WHEELS CENTRAL TEXAS IN-HOME CARE 3227 E. 5TH ST AUSTIN, TX 78702		PUBLIC CHARITY	GENERAL OPERATIONS	15,000.
MEALS ON WHEELS OF CENTRAL TEXAS P. O. BOX 6248 AUSTIN, TX 78762		PUBLIC CHARITY	GENERAL OPERATIONS	30,000.
MEALS ON WHEELS OF NORMAN, INC. PO BOX 1371 NORMAN, TX 73070		PUBLIC CHARITY	GENERAL OPERATIONS	25,000.
MEALS ON WHEELS PLUS, INCORPORATED 717 N 10TH ST ABILENE, TX 79601		PUBLIC CHARITY	HOME DELIVERED MEAL PROGRAM	30,000.
MEALS ON WHEELS SAN ANTONIO 4306 NW LOPO 410 SAN ANTONIO, TX 78229		PUBLIC CHARITY	GRACE PLACE ALZHEIMER'S CENTERS	25,000.
MEALS ON WHEELS SENIOR SERVICES 950 WILLIAMS ST. BLDG C, STE 200 ROCKWALL, TX 75087		PUBLIC CHARITY	BOARD WORK WITH AMY TEMPERLEY	1,200.
MEALS ON WHEELS SENIOR SERVICES 950 WILLIAMS ST. BLDG C, STE 200 ROCKWALL, TX 75087		PUBLIC CHARITY	GENERAL OPERATIONS	33,600.
METROPORT MEALS ON WHEELS 428 N HIGHWAY 377 ROANOKE, TX 76262		PUBLIC CHARITY	GENERAL OPERATIONS	25,000.
Total from continuation sheets				

CARL C 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
MIDLAND CHILDREN'S REHABILITATION CENTER 802 VENTURA AVE MIDLAND, TX 79705		PUBLIC CHARITY	GENERAL OPERATIONS	20,000.
MINISTRIES OF JESUS 1100 EAST I 35 FRONTAGE RD EDMOND, OK 73034		PUBLIC CHARITY	MEDICAL EQUIPMENT	6,800.
MIRACLE FLIGHTS FOR KIDS 5740 S EASTERN AVE STE 240 LAS VEGAS, NV 89119		PUBLIC CHARITY	MEDICAL FLIGHTS FOR CHILDREN (TX, OK, NM)	10,000.
MISSION CAPITAL 1920 MCKINNEY AVE 7TH FL DALLAS, TX 75201		PUBLIC CHARITY	GOOD MEASURE DATA INSTITUTE	2,700.
MISSION CENTER ADULT DAY SERVICE 3500 N A ST STE 1300 MIDLAND, TX 79705		PUBLIC CHARITY	CLIENT FINANCIAL ASSISTANCE PROGRAM	15,000.
MISSION ROAD DEVELOPMENTAL CENTER 8706 MISSION RD SAN ANTONIO, TX 78214		PUBLIC CHARITY	FREE TO BE PROGRAM	20,000.
MOBILE LOAVES AND FISHES 9301 HOY EYE RD STE 950 AUSTIN, TX 78724		PUBLIC CHARITY	GENERAL OPERATIONS (ECL DISCRETIONARY)	1,000.
MOONLIGHT FUND PO BOX 1299 BANDERA, TX 78003		PUBLIC CHARITY	SUPPORT PROGRAM FOR BURN SURVIVORS IN TX, OK, NM	17,000.
NAMI - TEXAS PO BOX 300817 AUSTIN, TX 78703		PUBLIC CHARITY	TEXAS SUICIDE PREVENTION COUNCIL (LUTZ)	19,000.
NEIGHBOR FOR NEIGHBOR INC 505 E 36TH ST NORTH TULSA, OK 74106		PUBLIC CHARITY	PROGRAMS FOR CHILDREN AND SENIORS	27,000.
Total from continuation sheets				

CARL C 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
NEW DAY YOUTH AND FAMILY SERVICES 1330 SAN PEDRO NE STE. 201-B ALBUQUERQUE, NM 87110		PUBLIC CHARITY	BRIDGES TO ADULTHOOD PROGRAM	40,000.
NEW MEXICO DONATED (FND FOR DENTAL H/R AND EDUCATION) P. O. BOX 16854 ALBUQUERQUE, NM 87191		PUBLIC CHARITY	DONATED DENTAL PROGRAM	30,000.
NEW MEXICO KIDS MATTER INC. 2340 ALAMO AVE SE STE 112 ALBUQUERQUE, NM 87106		PUBLIC CHARITY	CASA PROGRAM	15,000.
NEW MEXICO STATE UNIVERSITY FOUNDATION, INC. DOVE HALL RM 212 1305 N. HORSESHOE DR LAS CRUCES, NM 88003		PUBLIC CHARITY	THERAPEUTIC RIDING PROGRAM	5,000.
NEWGATE MISSION 207 S MOBBERLY AVE LONGVIEW, TX 75602		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
NMCAN 625 SILVER AVENUE SW STE 345 ALBUQUERQUE, NM 87102		PUBLIC CHARITY	TRANSITIONAL LIVING PROGRAM	20,000.
NORTHWEST ASSISTANCE MINISTRIES 15555 KUYKENDAHL RD. HOUSTON, TX 77090		PUBLIC CHARITY	CHILDREN'S CLINIC	30,000.
ODESSA CHRISTMAS IN ACTION, INC. 500 S LEE ST MIDLAND, TX 79701		PUBLIC CHARITY	HOME AND EMERGENCY REPAIRS FOR ELDERS, LOW INCOME	15,000.
OKLAHOMA BAPTIST HOMES FOR CHILDREN 3800 N MAY AVE OKLAHOMA CITY, OK 73112		PUBLIC CHARITY	GENERAL OPERATIONS	20,000.
OKLAHOMA FOUNDATION FOR THE DISABLED 8121 N. WALKER AVE OKLAHOMA CITY, OK 73114		PUBLIC CHARITY	CLIENT SCHOLARSHIP PROGRAM	50,000.
Total from continuation sheets				

CARL C 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
OPEN DOOR PRESCHOOLS 3804 CHERRYWOOD ROAD AUSTIN, TX 78722		PUBLIC CHARITY	SPECIAL NEEDS PROGRAM	10,000.
OPEN MY WORLD THERAPEUTIC RIDING CENTER 1020 COUNTY RD 270 LEANDER, TX 78641		PUBLIC CHARITY	THERAPEUTIC RIDING CENTER	5,000.
PASO DEL NORTE CHILDREN'S DEVELOPMENT CENTER 1101 E SCHUSTER AVE EL PASO, TX 79902		PUBLIC CHARITY	GENERAL OPERATIONS	20,000.
PATHWAYS FOR LITTLE FEET 9 GREENWAY PLAZA # 3150 HOUSTON, TX 77046		PUBLIC CHARITY	GENERAL OPERATIONS	3,500.
PAWS AND STRIPES 617 TRUMAN ST NE ALBUQUERQUE, NM 87110		PUBLIC CHARITY	CAPITAL CAMPAIGN	50,000.
PEDIPLACE 502 S OLD ORCHARD LN LEWISVILLE, TX 75067		PUBLIC CHARITY	GENERAL OPERATION	15,000.
PEOPLE'S COMMUNITY CLINIC 1101 CAMINO LA COSTA AUSTIN, TX 78752		PUBLIC CHARITY	SENIOR SAFETY NET INITIATIVE	20,000.
PEPPER'S RANCH PO BOX 3814 EDMOND, OK 73083		PUBLIC CHARITY	GENERAL OPERATIONS	40,000.
POINT RIDER 14001 ASHTON WOODS CR. AUSTIN, TX 78727		PUBLIC CHARITY	GENERAL OPERATIONS (CCA III)	8,500.
PORTALES CHURCH OF NAZARENE 823 W UNIVERSITY DR PORTALES, NM 88130		PUBLIC CHARITY	COMMUNITY FOOD PANTRY	5,000.
Total from continuation sheets				

CARL C 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
PRESBYTERIAN CHILDREN'S HOMES AND SERVICES 5920 W. WILLIAM CANNON DR BLDG 3-STE 100 AUSTIN, TX 78749		PUBLIC CHARITY	TRANSITIONAL LIVING PROGRAMS	25,000.
PRESBYTERIAN EAR INSTITUTE 415 CEDAR ST SE ALBUQUERQUE, NM 87106		PUBLIC CHARITY	SPEECH AND LANGUAGE THERAPY FOR LOW INCOME CHILDREN WITH HEARING LOSS	20,000.
PRESBYTERIAN HOME FOR CHILDREN DBA AMARILLO CHILDREN'S HOME 3400 BOWIE ST AMARILLO, TX 79109		PUBLIC CHARITY	GENERAL OPERATIONS	15,000.
PROJECT MEND 5727 IH 10 WEST SAN ANTONIO, TX 78201		PUBLIC CHARITY	DISASTER RELIEF/HURRICANE HARVEY	40,000.
PROSTHETIC FOUNDATION 5047 SHERRI ANN RD SAN ANTONIO, TX 78233		PUBLIC CHARITY	PROSTHETIC DEVICES FOR AMPUTEES	7,500.
RAINBOW SENIOR CENTER @ KRONKOSKY PLACE 17 OLD SAN ANTONIO RD BOERNE, TX 78006		PUBLIC CHARITY	MEALS ON WHEELS AND TRANSPORTATION PROGRAMS - 2 FOR 1 MATCH	20,000.
RAWSON SAUNDERS SCHOOL 2614A EXPOSITION BLVD AUSTIN, TX 78703		PUBLIC CHARITY	GENERAL OPERATIONS	2,000.
REFUGE SERVICES INC P. O. BOX 53684 LUBBOCK, TX 79453		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
RIO GRANDE DOWN SYNDROME NETWORK P. O. BOX 6759 ALBUQUERQUE, NM 87111		PUBLIC CHARITY	GENERAL OPERATIONS	30,000.
RONALD MCDONALD HOUSE CHARITIES OF AUSTIN & CENTRAL INC 1615 BARBARA JORDAN BLVD. AUSTIN, TX 78723		PUBLIC CHARITY	SCHOLARSHIPS FOR LOW	15,000.
Total from continuation sheets				

CARL C 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
RONALD MCDONALD HOUSE CHARITIES OF EL PASO 300 E. CALIFORNIA AVE. EL PASO, TX 79902		PUBLIC CHARITY	2016 LIGHTS OF LOVE EVENT (SCHOLARSHIPS FOR CHILDREN -- CHALLENGE)	15,000.
RONALD MCDONALD HOUSE CHARITIES OF NEW MEXICO 1011 YALE BLVD NE ALBUQUERQUE, NM 87106		PUBLIC CHARITY	CAMPAIGN TO RAISE \$35,000 . . . SCHOLARSHIPS FOR LOW INCOME FAMILIES	12,000.
ROUND ROCK POLICE DEPT/OPERATION BLUE SANTA 2701 N MAYS ST ROUND ROCK, TX 78665		PUBLIC CHARITY	2018 BLUE SANTA XMAS	2,000.
SACRAMENTO MOUNTAINS SENIOR SERVICES, INC 212 GLORIETA AVE CLOUDCROFT, NM 88317		PUBLIC CHARITY	GENERAL OPERATIONS	20,000.
SAFE HOUSE 921 AMERICAN PACIFIC DR STE 300 HENDERSON, NV 89014		PUBLIC CHARITY	PROGRAMS FOR CHILDREN	25,000.
SALADO FAMILY RELIEF FUND PO BOX 461 SALADO, TX 76571		PUBLIC CHARITY	GENERAL OPERATIONS	1,500.
SAMARITAN HOUSE, INC. 1000 MILLS AVE LAS VEGAS, NM 87701		PUBLIC CHARITY	GENERAL OPERATIONS KR	2,000.
SAN MARCOS LION'S CHARITIES, INC PO BOX 994 SAN MARCOS, TX 78667		PUBLIC CHARITY	GENERAL OPERATIONS	10,000.
SAN MARCOS POLICE BLUE SANTA PROGRAM 2300 IH 35 SOUTH SAN MARCOS, TX 77666		PUBLIC CHARITY	2017 BLUE SANTA PROGRAM	2,000.
SENIOR ACCESS 2498 E PALM VALLEY BLVD ROUND ROCK, TX 78665		PUBLIC CHARITY	GENERAL OPERATIONS/VOLUNTEER RECRUITMENT	20,000.
Total from continuation sheets				

CARL C 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
SENIOR LINK MIDLAND PO BOX 80519 MIDLAND, TX 78708		PUBLIC CHARITY	MEALS ON WHEELS AND HOMEBOUND SERVICES	25,000.
SHARING HANDS A RESPITE EXPERIENCE (SHARE) 1301 W LOUISIANA AVE MIDLAND, TX 79701		PUBLIC CHARITY	GENERAL OPERATIONS	25,000.
SJRC TEXAS 1400 RIDGE CREEK LN BULVERDE, TX 78163		PUBLIC CHARITY	THERAPEUTIC RESIDENTIAL FOSTER CARE	25,000.
SMITHVILLE ISD 901 NE 6TH ST SMITHVILLE, TX 78957		PUBLIC CHARITY	SUMMER FOOD PROGRAM	1,100.
SOAR ARENA THERAPEUTIC 318 EL CAMINO WY. SAN MARCOS, TX 78666		PUBLIC CHARITY	GENERAL OPERATIONS	2,500.
SOUTH CENTRAL INDUSTRIES, INC. 130 N LOUISA AVE SHAWNEE, OK 74801		PUBLIC CHARITY	WAREHOUSE ACQUISITION	40,000.
SOUTH TEXAS CHILDREN'S HOME MINISTRIES PO BOX 759 BEEVILLE, TX 78104		PUBLIC CHARITY	GENERAL OPERATIONS/FOOD PROGRAM FOR RESIDENTIAL CHILDREN'S HOME	15,000.
SOUTH TULSA COMMUNITY HOUSE 5780 S PEORIA AVE TULSA, OK 74105		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
SPECIAL OLYMPICS NEW MEXICO 6600 PALOMAS AVE NE #207 ALBUQUERQUE, NM 87109		PUBLIC CHARITY	GENERAL OPERATIONS (RRR)	3,500.
SPIRIT REINS 2055 COUNTY ROAD 284 LIBERTY HILL, TX 78642		PUBLIC CHARITY	SCHOLARSHIPS FOR CHILDREN	5,000.
Total from continuation sheets				



CARL C 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
ST. BONAVENTURE INDIAN MISSION P. O. BOX 610 THOREAU, NM 87323		PUBLIC CHARITY	WATER DELIVERY PROJECT	3,000.
ST. ELIZABETH SHELTERS 804 ALARID STREET SANTA FE, NM 87505		PUBLIC CHARITY	SHELTER AND MEALS	3,000.
ST. FELIX PANTRY INC 4020 BARBARA LOOP SE RIO RANCHO, NM 87124		PUBLIC CHARITY	GENERAL OPERATIONS	21,000.
ST. IGNATIUS MARTYR CATHOLIC CHURCH 120 W OLTORF ST AUSTIN, TX 78704		PUBLIC CHARITY	GENERAL OPERATIONS (ECL DISCRETIONARY)	1,000.
ST. JUDE CHILDREN'S RESEARCH HOSPITAL 262 DANNY THOMAS PL MEMPHIS, TN 38105		PUBLIC CHARITY	MEDICAL RESEARCH	17,500.
ST. PETER-ST. JOSEPH CHILDREN'S HOME (ST. PJ'S) 920 MISSION RD SAN ANTONIO, TX 78210		PUBLIC CHARITY	GENERAL OPERATIONS	15,000.
STARRY 1301 N. MAYS STREET ROUND ROCK, TX 78664		PUBLIC CHARITY	GENERAL OPERATIONS (SHELTER)	50,000.
STILLWATER FIRST UNITED METHODIST CHURCH 400 W 7TH AVE STILLWATER, OK 74074		PUBLIC CHARITY	WEEKEND BACKPACK PROGRAM (CCA)	5,000.
STOREHOUSE PO BOX 968 MORIARTY, NM 87035		PUBLIC CHARITY	EXPANSION OF MOBILE NEIGHBORHOOD FOOD PANTRY	32,000.
SUNBEAM FAMILY SERVICES INC 100 NW 14TH ST. OKLAHOMA CITY, OK 73020		PUBLIC CHARITY	SENIOR SERVICES	20,000.
Total from continuation sheets				

CARL C 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
SUNSHINE INDUSTRIES 500 PARK STREET SE ARDMORE, OK 73402		PUBLIC CHARITY	GENERAL OPERATIONS	25,000.
SUSTAINABLE FOOD CENTER INC 2921 E 17TH ST. BLDG. C AUSTIN, TX 78702		PUBLIC CHARITY	DOUBLE DOLLARS PROGRAM	5,000.
TAOS FEEDS TAOS PO BOX 234 TAOS, NM 87571		PUBLIC CHARITY	HOLIDAY FOOD DRIVE (RRR DISCRETIONARY)	3,000.
TEAMABILITY INC. 1711 N. TRINITY SAN ANTONIO, TX 78201		PUBLIC CHARITY	GENERAL OPERATIONS	35,000.
TEXAS BAPTIST CHIDREN'S HOME 1101 N MAYS ST ROUND ROCK, TX 78664		PUBLIC CHARITY	INDEPENDENT LIVING PROGRAM (CONTINUATION OF SUPPORT)	50,000.
TEXAS PARENT TO PARENT 1805 RUTHERFORD LANE #201 AUSTIN, TX 78754		PUBLIC CHARITY	GENERAL OPERATIONS	2,000.
TEXAS RAMP PROJECT PO BOX 832065 RICHARDSON, TX 75083		PUBLIC CHARITY	GENERAL OPERATIONS (TX AND NM)	35,000.
TEXAS SCHOOL FOR THE DEAF FOUNDATION P. O. BOX 42727 AUSTIN, TX 78704		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
TEXAS VETERINARY MEDICAL FOUNDATION 8104 EXCHANGE DR AUSTIN, TX 78754		PUBLIC CHARITY	PALS PROGRAM	5,000.
THE ARC OF SAN ANTONIO 13430 W. AVENUE SAN ANTONIO, TX 78216		PUBLIC CHARITY	LIFE ENRICHMENT FOR ADULTS	25,000.
Total from continuation sheets				

CARL C 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 ATHENS SAMARITIAN DBA LABOR OF LOVE 309 ROYAL ST ATHENS, TX 75751		PUBLIC CHARITY	MAJOR HOME REPAIR PROGRAM	15,000.
THE AUSTIN CENTER FOR GRIEF & LOSS 2413 GREENLAWN PKWY AUSTIN, TX 78757		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
THE CHILDREN'S CENTER, INC. 6800 NW 39TH EXPRESSWAY BETHANY, OK 73008		PUBLIC CHARITY	MEDICAL EQUIPMENT	29,000.
THE LITTLE LIGHT HOUSE 5120 E. 36TH ST. TULSA, OK 74135		PUBLIC CHARITY	SPONSOR A CHILD	5,000.
THE NATIONAL CENTER FOR FRONTIER COMMUNITIES 610 N BULLARD ST SILVER CITY, NM 88061		PUBLIC CHARITY	NEW/USED REFRIGERATED VAN PURCHASE	80,000.
THE SAFE ALLIANCE 4800 MANOR RD AUSTIN, TX 78723		PUBLIC CHARITY	EMERGENCY SHELTER	90,000.
THE SALVATION ARMY - AUSTIN 10711 BURNETT RD # 231 AUSTIN, TX 78758		PUBLIC CHARITY	WOMENS AND CHILDRENS	2,000.
THERAPY PET PALS OF TEXAS, INC. 3930 BEE CAVE RD STE C AUSTIN, TX 78746		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
TILT 4012 SIERRA DR AUSTIN, TX 78731		PUBLIC CHARITY	THEATRE PERFORMANCES FOR PEOPLE WITH DISABILITIES	5,000.
TITUS COUNTY CARES PO BOX 1476 MOUNT PLEASANT, TX 75456		PUBLIC CHARITY	FOOD 4 KIDS PROGRAM	20,000.
Total from continuation sheets				

CARL C 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
TRANSITIONAL LIVING CENTER OF OK INC (DBA LINDSEY HOUSE) 601 S ELGIN AVE TULSA, OK 74120		PUBLIC CHARITY	GENERAL OPERATIONS	15,000.
TRAVIS COUNTY SHERIFF DEPT. PO BOX 1748 AUSTIN, TX 78767		PUBLIC CHARITY	2017 BROWN SANTA PROGRAM	2,000.
UNITED WAY OF SANTA FE COUNTY 3942 AGUA FRIA ST SANTA FE, NM 87507		PUBLIC CHARITY	PRE K PROGRAM (EXPANSION AND REVISION)	20,000.
UNIVERSITY MEDICAL CENTER OF EL PASO 4815 ALAMEDA AVE EL PASO, TX 79905		PUBLIC CHARITY	FALL PREVENTION CLASSES FOR SENIORS	6,000.
UNIVERSITY OF NEW MEXICO COLLEGE OF NURSING 2502 MARBLE AVE NE BUILDING # 228 ALBUQUERQUE, NM 87131		PUBLIC CHARITY	NM NURSING EDUCATION CONSORTIUM	5,000.
UNIVERSITY OF TEXAS MEDICAL BRANCH, GALVESTON 301 UNIVERSITY BLVD GALVESTON, TX 77555		PUBLIC CHARITY	"ALZHEIMER'S RESEARCH (COMBINATION THERAPY OF FDA APPROVED INHIBITOR AND ANTI-TAU ANTIBODIES)	100,000.
VARIETY - THE CHILDREN'S CHARITY OF TEXAS 5555 N LAMAR BLVD STE K113 AUSTIN, TX 78751		PUBLIC CHARITY	DIRECT SERVICES FOR CHILDREN WITH SPECIAL NEEDS (ASSISTANCE WITH MEDICAL, WHEELCHAIRS, VANS, SERVICE DOGS,	5,000.
VELA 4900 GONZALES STREET AUSTIN, TX 78702		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
VITA LIVING INC 3300 S GESSNER RD. #150 HOUSTON, TX 77063		PUBLIC CHARITY	TRANSPORTATION PROGRAM	25,000.
VOLUNTEER INTERFAITH CAREGIVERS SW 5001 BELLAIRE BLVD. BELLAIRE, TX 77401		PUBLIC CHARITY	GENERAL OPERATIONS	5,000.
Total from continuation sheets				

CARL C 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
WASHINGTON COUNTY ELDER CARE 1223 SWAN DRIVE BARTLESVILLE, OK 74006		PUBLIC CHARITY	GENERAL OPERATIONS	25,000.
WEST TX FOOD BANK 411 S. PAGEDWOOD AVE ODESSA, TX 79761		PUBLIC CHARITY	FOOD 2 KIDS PROGRAM	25,000.
WINGS FOR LIFE 505 N PENNSYLVANIA AVE ROSWELL, NM 88201		PUBLIC CHARITY	GENERAL OPERATIONS (RRR)	5,000.
WOVENLIFE 701 NE 13TH ST OKLAHOMA CITY, OK 73104		PUBLIC CHARITY	GENERAL OPERATIONS	25,000.
YOUTH AND FAMILY ALLIANCE, DBA LIFEWORKS 3700 S 1ST ST AUSTIN, TX 78704		PUBLIC CHARITY	TRANSITIONAL LIVING PROGRAM	15,000.
YOUTH SERVICES OF TULSA, INC 311 S. MADISON AVE TULSA, OK 74120		PUBLIC CHARITY	TRANSITIONAL LIVING SERVICES	30,000.
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 - AUSTIN CHILD GUIDANCE CENTER

CONTINUATION OF SUPPORT FOR UNDERSERVED CHILDREN'S MENTAL HEALTH

PROGRAM AND/OR SUPPORT OF EXPANSION PROJECT

NAME OF RECIPIENT - FIRST CHOICE COMMUNITY HEALTHCARE

FUNDRAISING PROFESSIONAL TO ASSIST WITH SOUTH VALLEY COMMON

EXPANSIONREQUEST: \$50,000 (\$30 STD/\$20 C) FIRST YEAR AND \$25,000 (C)

SECOND YEAR

NAME OF RECIPIENT - UNIVERSITY OF TEXAS MEDICAL BRANCH, GALVESTON

"ALZHEIMER'S RESEARCH (COMBINATION THERAPY OF FDA APPROVED INHIBITOR

AND ANTI-TAU ANTIBODIES) COLLABORATION WITH GILLSON/LONGENBAUGH G.

TAGLIALATELA & R. KAYED"

NAME OF RECIPIENT - VARIETY - THE CHILDREN'S CHARITY OF TEXAS

DIRECT SERVICES FOR CHILDREN WITH SPECIAL NEEDS (ASSISTANCE WITH

MEDICAL, WHEELCHAIRS, VANS, SERVICE DOGS, CAMP, ETC)



**Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations**

- |   |                   |
|---|-------------------|
| <p><b>1</b> Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p> <p><b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p><b>b</b> Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p><b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p><b>d</b> If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.</p> | <p><b>Yes</b></p> |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |
|   |                   |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign  
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Nina L. Behan  
Signature of officer or trustee

Date \_\_\_\_\_

of which preparer has any knowledge

TRUSTEE - BANK OF  
AMERICA, N. A.

May the IRS discuss this return with the preparer shown below? See instr

☒ Yes ☐ No**Paid  
Preparer  
Use Only**

Print/Type preparer's name

KELLY LOGAN

Preparer's signature \_\_\_\_\_

KELLY LOGAN

Date

11/12/19

Check ☐  
self-employed

PTIN

P00677048

Firm's name ▶ PMB HELIN DONOVAN, LLP

Firm's EIN ▶ 74-3001153

Firm's address ▶ 12301 RESEARCH BLVD BLDG 5 #160  
AUSTIN, TX 78759

Phone no. (512) 258-9670

Form **990-PF** (2018)



## 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.	222.	
INTEREST INCOME - EXCELSIOR PRIVATE MARKET FUNDS III	0.	808.	
INTEREST INCOME- US TRUST	67,107.	67,107.	
TOTAL TO PART I, LINE 3	67,107.	68,137.	

## 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 - CROSSROADS PRIVATE MARKET FUND IV	0.	0.	0.	2,041.	
DIVIDEND INCOME - CROSSROADS PRIVATE MARKET FUND V	0.	0.	0.	962.	
DIVIDEND INCOME - US TRUST	1,434,941.	0.	1,434,941.	1,434,941.	
TO PART I, LINE 4	1,434,941.	0.	1,434,941.	1,437,944.	

## 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	413,616.	413,616.	
OTHER INCOME - CROSSROADS PRIVATE MARKETS FUND V	0.	518.	
TOTAL TO FORM 990-PF, PART I, LINE 11	413,616.	414,134.	

## FORM 990-PF

## LEGAL FEES

## STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	39,765.	0.		39,765.
TO FM 990-PF, PG 1, LN 16A	39,765.	0.		39,765.

## FORM 990-PF

## ACCOUNTING FEES

## STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX REVIEW FEE - BOA	2,223.	1,334.		889.
ACCOUNTING	17,059.	10,235.		6,824.
TO FORM 990-PF, PG 1, LN 16B	19,282.	11,569.		7,713.

## FORM 990-PF

## OTHER PROFESSIONAL FEES

## STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL FEES	3,464.	0.		3,464.
INVESTMENT MANAGEMENT FEES	51,013.	51,013.		0.
TO FORM 990-PF, PG 1, LN 16C	54,477.	51,013.		3,464.

## FORM 990-PF

## TAXES

## STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	27,624.	27,624.		0.
FOREIGN TAXES ON QUALIFIED	22,729.	22,729.		0.
FOREIGN TAXES ON				
NON-QUALIFIED	5,776.	5,776.		0.
EMPLOYER PAYROLL TAXES	35,873.	0.		35,873.
EXCISE TAX	0.	0.		0.
PROPERTY TAXES	574.	0.		574.
O&G AD VALOREM TAXES	23,392.	23,392.		0.
TO FORM 990-PF, PG 1, LN 18	115,968.	79,521.		36,447.

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
WEBSITE CONTRACT/ MAINT.	1,784.	0.		1,784.
INSURANCE	7,914.	0.		7,914.
OTHER ROYALTY EXPENSE	36.	36.		0.
SOFTWARE EXPENSE	21,552.	0.		21,552.
BUSINESS DEVELOPMENT	10,502.	0.		10,502.
PARTNERSHIP - PORTFOLIO				
DEDUCTIONS	0.	58,326.		0.
WORKERS' COMPENSATION				
INSURANCE	595.	0.		595.
DUES, SUBSCRIPTIONS	1,278.	0.		1,278.
TELEPHONE & INTERNET	5,256.	0.		5,256.
POSTAGE	1,185.	0.		1,185.
OFFICE EXPENSE	5,926.	0.		5,926.
FIXED ASSET REPLACEMENT	6,395.	0.		6,395.
TO FORM 990-PF, PG 1, LN 23	62,423.	58,362.		62,387.

FORM 990-PF	CORPORATE STOCK	STATEMENT 9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	45,515,817.	51,155,506.
TOTAL TO FORM 990-PF, PART II, LINE 10B	45,515,817.	51,155,506.

FORM 990-PF	CORPORATE BONDS	STATEMENT 10
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	8,734,876.	8,685,983.
TOTAL TO FORM 990-PF, PART II, LINE 10C	8,734,876.	8,685,983.

FORM 990-PF	OTHER INVESTMENTS		STATEMENT 11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
PRIVATE EQUITY	COST	3,312,500.	4,380,068.
MINERAL INTERESTS/COMMODITIES	COST	298,134.	2,256,806.
HEDGE FUND	COST	2,989,363.	2,839,238.
TOTAL TO FORM 990-PF, PART II, LINE 13		6,599,997.	9,476,112.

## FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT

## STATEMENT 12

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
BREAKROOM TABLE SE	317.	317.	0.
FILE CABINET	420.	420.	0.
FURNITURE & FIXTURES	5,684.	5,684.	0.
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.	45,182.	331.

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
JENNIFER BIRD 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	TRUSTEE/CHAIRMAN OF BOARD 1.00	40,000.	0.	0.
R. RUSSELL RAGER 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	TRUSTEE 1.00	15,000.	0.	0.
CARL C. ANDERSON III 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	TRUSTEE 1.00	30,000.	0.	0.
BRADFORD H. ROBB 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	EXECUTIVE DIRECTOR 40.00	268,917.	16,135.	0.
CLARK LUTZ 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	TRUSTEE 1.00	20,000.	0.	0.
KURT AUSTIN RAGER 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	ASSOCIATE TRUSTEE 1.00	24,877.	0.	0.
STACEY ANDERSON 114 W. 7TH STREET, SUITE 1200 AUSTIN, TX 78701	ASSOCIATE TRUSTEE 1.00	24,877.	0.	0.
BANK OF AMERICA, N.A. 901 MAIN ST, FL 19 DALLAS, TX 75202-3714	TRUSTEE 1.00	310,631.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		734,302.	16,135.	0.

## GENERAL EXPLANATION

STATEMENT 14

## 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.