Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ 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 01-01-2018 , and ending 12-31-2018

Name of foundation
HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

A Employer identification number
75-2734032

Number and street (or P O box number if mail is not delivered to street address)
325 N ST PAUL STREET

Room/suite

B Telephone number (see instructions)
(214) 220-2128

City or town, state or province, country, and ZIP or foreign postal code
DALLAS, TX 75201

C If exemption application is pending, check here ▶ ☐

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

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 ▶ ☐

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)* ▶$ 61,319,823

J Accounting method ☐ Cash ☑ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis)

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)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	31,582			
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	596,289	596,289		
	4	Dividends and interest from securities	1,594,744	1,594,744		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	683,546			
	b	Gross sales price for all assets on line 6a 6,176,543				
	7	Capital gain net income (from Part IV, line 2)		683,546		
	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) (attach schedule)				
	11	Other income (attach schedule)	886,190	515,047		
	12	**Total.** Add lines 1 through 11	3,792,351	3,389,626		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	768,748	373,735		395,013
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits	69,253	32,486		36,767
	16a	Legal fees (attach schedule)	27,420	5,296		22,124
	b	Accounting fees (attach schedule)	24,650	12,400		12,250
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	-13,902	18,068		20,042
	19	Depreciation (attach schedule) and depletion	54,061	54,061		
	20	Occupancy	41,632	20,816		20,816
	21	Travel, conferences, and meetings	145,217	24,100		121,117
	22	Printing and publications	1,099	309		790
	23	Other expenses (attach schedule)	706,470	294,179		111,316
	24	**Total operating and administrative expenses.** Add lines 13 through 23	1,824,648	835,450		740,235
	25	Contributions, gifts, grants paid	2,332,066			2,332,066
	26	**Total expenses and disbursements.** Add lines 24 and 25	4,156,714	835,450		3,072,301
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-364,363			
	b	**Net investment income** (if negative, enter -0-)		2,554,176		
	c	**Adjusted net income** (if negative, enter -0-)				

Part II Balance Sheets

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	3,861,970	175,114	175,114
	2	Savings and temporary cash investments	245,185	1,462,756	1,462,756
	3	Accounts receivable ▶ 158,332			
		Less allowance for doubtful accounts ▶	207,509	158,332	158,332
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	58,949	25,434	25,434
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	30,286,780	24,086,606	24,086,606
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ 279,402			
		Less accumulated depreciation (attach schedule) ▶	279,402	279,402	279,402
	12	Investments—mortgage loans	5,440,203	4,825,421	4,825,421
	13	Investments—other (attach schedule)	25,661,590	30,288,050	30,288,050
	14	Land, buildings, and equipment basis ▶ 121,033			
		Less accumulated depreciation (attach schedule) ▶ 102,325	27,172	18,708	18,708
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	66,068,760	61,319,823	61,319,823
Liabilities	17	Accounts payable and accrued expenses	15,040	8,501	
	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 ▶)	205,109	6,430	
	23	**Total liabilities**(add lines 17 through 22)	220,149	14,931	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☑ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	65,848,611	61,304,892	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see instructions)	65,848,611	61,304,892	
	31	**Total liabilities and net assets/fund balances** (see instructions)	66,068,760	61,319,823	

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	65,848,611
2	Enter amount from Part I, line 27a	2	-364,363
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	65,484,248
5	Decreases not included in line 2 (itemize) ▶	5	4,179,356
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	61,304,892

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

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

(i) F M V as of 12/31/69	(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 See Additional Data Table			
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	683,546
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 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	3,052,176	64,032,628	0 04767
2016	3,054,080	62,925,510	0 04854
2015	3,180,483	68,089,950	0 04671
2014	2,817,981	63,287,615	0 04453
2013	2,912,987	61,461,439	0 04740

2 Total of line 1, column (d)	2	0 234833
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 046967
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	65,280,966
5 Multiply line 4 by line 3	5	3,066,051
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	25,542
7 Add lines 5 and 6	7	3,091,593
8 Enter qualifying distributions from Part XII, line 4	8	3,072,301

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b			1	51,084
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	
3	Add lines 1 and 2			3	51,084
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	51,084
6	Credits/Payments				
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	124,400		
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	124,400
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	73,316
11	Enter the amount of line 10 to be **Credited to 2019 estimated tax** ▶ 40,000	**Refunded** ▶		11	33,316

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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition)	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ________ **(2)** On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶TX			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities (continued)

			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.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶WWW HATTONSUMNERS ORG

14 The books are in care of ▶CHARLES PIERSON Telephone no ▶(214) 220-2128

Located at ▶325 NORTH ST PAUL SUITE 3920 DALLAS TX ZIP+4 ▶752013821

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 |

			Yes	No
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?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes", enter the name of the foreign country ▶			

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

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

				Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance? See instructions		1b		No
	Organizations relying on a current notice regarding disaster assistance check here. ▶	☐			
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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018?.	☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)		2b		No
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?.	☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 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).*		3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?		4b		No

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

			Yes	No
5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?. ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? See instructions. ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?. ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance? See instructions	5b		No
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?. ☐ Yes ☑ No			
	If "Yes," attach the statement required by Regulations section 53 4945–5(d)			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?. ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		No
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 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, 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
See Additional Data Table				

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

(a) Name and address of each employee paid more than $50,000	**(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
WENDY WERNER 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	EXEC ASSISTANT 40 00	77,338	11,601	
EILEEN C RESNIK 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	PROGRAM OFFICER 40 00	91,881	13,782	

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

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	
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	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	

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	28,500,632
b	Average of monthly cash balances			1b	2,288,761
c	Fair market value of all other assets (see instructions)			1c	35,485,699
d	**Total** (add lines 1a, b, and c)			1d	66,275,092
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0		
2	Acquisition indebtedness applicable to line 1 assets			2	
3	Subtract line 2 from line 1d			3	66,275,092
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)			4	994,126
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4			5	65,280,966
6	**Minimum investment return.** Enter 5% of line 5			6	3,264,048

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	3,264,048
2a	Tax on investment income for 2018 from Part VI, line 5	2a	51,084		
b	Income tax for 2018 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	51,084
3	Distributable amount before adjustments Subtract line 2c from line 1			3	3,212,964
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	3,212,964
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	3,212,964

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	3,072,301
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	3,072,301
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	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	3,072,301

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				3,212,964
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			2,911,017	
b Total for prior years 20____ , 20____ , 20____				
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.				
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ $ 3,072,301				
a Applied to 2017, but not more than line 2a			2,911,017	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2018 distributable amount.				161,284
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2018				
(If an amount appears in column (d), the same amount must be shown in column (a))				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount —see instructions				
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				3,051,680
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 2013 not applied on line 5 or line 7 (see instructions) . . .				
9 **Excess distributions carryover to 2019.** Subtract lines 7 and 8 from line 6a				
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. . . .				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. . . . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2018	**(b)** 2017	**(c)** 2016	**(d)** 2015	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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 e-mail address of the person to whom applications should be addressed

CHARLES PIERSON
325 N ST PAUL STREET SUITE 3920
DALLAS, TX 752013821
(214) 220-2128
CHARLES@SUMNERSFOUNDATION ORG

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

LETTER, RESUME OF ORGANIZATION OR PERSON AND OTHER SUPPORTING MATERIAL

c Any submission deadlines

VARIOUS

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

AWARDS ARE LIMITED TO THE STUDY AND TEACHING OF THE SCIENCE OF SELF-GOVERNMENT

Part XV **Supplementary Information** (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	596,289	
4 Dividends and interest from securities. . . .			14	1,594,744	
5 Net rental income or (loss) from real estate					
a Debt-financed property.	531120	81,470			
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					683,546
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a OIL & GAS ROYALTIES			15	515,047	
b Pass Through UBI from K-1	531120	-11,302			
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		70,168		2,706,080	683,546

13 Total. Add line 12, columns (b), (d), and (e). 13 3,459,794

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	**1a(1)**		**No**
(2) Other assets.	**1a(2)**		**No**
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		**No**
(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		**No**
(3) Rental of facilities, equipment, or other assets.	**1b(3)**		**No**
(4) Reimbursement arrangements.	**1b(4)**		**No**
(5) Loans or loan guarantees.	**1b(5)**		**No**
(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		**No**
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		**No**

d 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

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

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

******	2019-10-21	******	May the IRS discuss this return with the preparer shown below (see instr)? ☑ **Yes** ☐ **No**
Signature of officer or trustee	Date	Title	

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
Kimberly D Crawford				P00446484
Firm's name ▶ Sutton Frost Cary LLP				Firm's EIN ▶75-2593210
Firm's address ▶ 600 Six Flags Dr Suite 600 Arlington, TX 76011				Phone no (817) 649-8083

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
1 BROADVIEW OPPORTUNITY FUND	P	2010-01-01	2018-03-07
1 BROADVIEW OPPORTUNITY FUND	P	2010-01-01	2018-12-11
JANUS ENTERPIRSE FUND I	P	2010-01-01	2018-03-07
JANUS ENTERPIRSE FUND I	P	2010-01-01	2018-12-10
LAZARD INT STRAT EQUITY	P	2010-01-01	2018-12-10
LAZARD INT STRAT EQUITY	P	2010-01-01	2018-12-11
NUANCE CONCENTRATED VALUE	P	2010-01-01	2018-03-07
NUANCE CONCENTRATED VALUE	P	2010-01-01	2018-12-10
VANGUARD INSTITUTIONAL INDEX	P	2010-01-01	2018-03-07
VANGUARD INSTITUTIONAL INDEX	P	2010-01-01	2018-12-10

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
400,000		426,281	-26,281
250,000		359,234	-109,234
400,000		290,398	109,602
150,000		113,361	36,639
600,000		553,230	46,770
100,000		91,818	8,182
400,000		370,227	29,773
150,000		142,468	7,532
800,000		497,428	302,572
400,000		256,837	143,163

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-26,281
			-109,234
			109,602
			36,639
			46,770
			8,182
			29,773
			7,532
			302,572
			143,163

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

	(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)
	WILLIAMS BLAIR EMERGING MARKETS	P	2010-01-01	2018-03-07
1	FEDERATED ULTRASHORT BOND	P	2018-01-01	2018-05-17
	FEDERATED ULTRASHORT BOND	P	2018-01-01	2018-05-24
	FEDERATED ULTRASHORT BOND	P	2018-01-01	2018-07-11
	FEDERATED ULTRASHORT BOND	P	2018-01-01	2018-09-04
	FEDERATED ULTRASHORT BOND	P	2010-01-01	2018-11-19
	MISCELLANEOUS SALES	P	2010-01-01	2018-12-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
500,000		371,517	128,483
400,000		400,000	
250,000		250,000	
250,000		250,000	
250,000		250,000	
869,243		870,198	-955
7,300			7,300

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			128,483
			-955
			7,300

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

(a) Name and address	Title, and average hours per week **(b)** devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
DAVID G DRUMM 901 MAIN STREET STE 500 DALLAS, TX 752023767	Chairman 2 00	32,000		
CHARLES L MOORE 5901-J WYOMING BLVD NE 154 ALBUQUERQUE, NM 87109	Director 2 00	3,963		
JERRY D REIS 6012 W CAMPUS CIRCLE DR 210 IRVING, TX 75063	Treasurer 2 00	29,000		
LON R WILLIAMS 2501 N HARWOOD SUITE 1900 DALLAS, TX 75201	Director 2 00	27,000		
W DALE CRANE PO BOX 92817 SOUTHLAKE, TX 76092	Director 2 00	27,000		
SCOTT M HIGGINBOTHAM 125 BELLAIRE AVENUE DUMAS, TX 79029	Director 2 00	27,000		
WILLIAM W MEADOWS 421 W 3RD STREET SUITE 800 FORT WORTH, TX 76102	VICE CHAIRMAN 2 00	30,500		
HUGH C AKIN-THRU 92018 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	Executive Dir 40 00	126,619	18,993	
MIKE MCELROY 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	Controller 40 00	87,000	13,050	
BETH VAN DUYNE 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	Secretary 2 00	0		
BRANT C MARTIN 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	Director 2 00	27,000		
T Charles Pierson-FROM 1018 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	Executive Dir 40 00	73,077	10,962	

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
BAYLOR UNIVERSITY1311 S 5TH ST WACO, TX 76706	NONE	PC	ıENGAGE SUMMER CIVICS	25,000
THE BILL OF RIGHTS INSTITUTE 200 NORTH GLEBE ROAD ARLINGTON, VA 22203	NONE	PC	CONSTITUTION SEMINAR N M & OK TEACHERS	25,000
FOUNDATION FOR TEACHING ECONOMICS 260 RUSSELL BLVD DAVIS, CA 95616	NONE	PC	ECONOMICS FOR LEADERS	75,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
FUND FOR AMERICAN STUDIES 1706 NEW HAMPSHIRE AVE WASHINGTON, DC 20009	NONE	PC	UNDERGRAD SCHOLARSHIPS TO WASHINGTON D C	41,600
GLASSHOUSE POLICY 1408 E 13TH STREET AUSTIN, TX 78702	NONE	PC	Online Public Policy Development	20,777
HUSTON-TILLOTSON COLLEGE 900 CHICON STREET AUSTIN, TX 78702	NONE	PC	SUMNERS SCHOLARSHIPS	72,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
INSTITUTE FOR POLICY INNOVATION 1660 S INTERSTATE 35-E LEWISVILLE, TX 75067	NONE	PC	HWS DISTINGUISHED LECTURES (#1 OF 2)	300,000
LAW FOCUSED EDUCSTATE BAR OF TEXAS 14651 DALLAS PKWY DALLAS, TX 75254	NONE	PC	"BEING AN AMERICAN" CURRICULUM	18,825
OCU SCHOOL OF LAW 800 N HARVEY AVE OKLAHOMA CITY, OK 73102	NONE	PC	HIGH IDEALS SCHOLARSHIP PREVIEW	15,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
PHILANTHROPY ROUNDTABLE 1730 M STREET NM WASHINGTON, DC 20036	NONE	PC	GENERAL SUPPORT AND ALLIANCE FOR CHARITABLE REFORM	8,000
PROJECT VOTE SMART ONE COMMON GROUND PHILIPSBURG, MT 59858	NONE	PC	OPERATIONS SUPPORT	50,000
SCHREINER UNIVERSITY 2100 SAN ANTONIO HWY KERRVILLE, TX 78028	NONE	PC	WHITEHURST AWARDS & SCHOLARSHIP PROGRAM DEVELOPMENT	8,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SMU-DEDMAN SCHOOL OF LAW PO BOX 750100 DALLAS, TX 75275	NONE	PC	SUMMER SCHOLARS ENDOWMENT	85,771
ST EDWARDS UNIVERSITY 3001 S CONGRESS AVE AUSTIN, TX 78704	NONE	PC	SUMNERS SCHOLARSHIP PROGRAM	80,000
TEXAS CHRISTIAN UNIVERSITY 2800 S UNIVERSITY DR FORT WORTH, TX 76129	NONE	PC	DISTINGUISHED SCHOLARS (FORMERLY PARTIAL TUITION)	17,500
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
TEXAS WESLEYAN UNIVERSITY 1201 WESLEYAN ST FORT WORTH, TX 75105	NONE	PC	SCHOLARSHIP PROGRAM DEVELOPMENT	6,000
UNIVERSITY OF DALLAS 1845 E NORTHGATE DR IRVING, TX 75062	NONE	PC	SUMNERS SCHOLARSHIP PROGRAM	100,000
UNIVERSITY OF NORTH TEXAS FOUNDATION 1155 UNION CIRCLE DENTON, TX 76203	NONE	PC	SUPPORT FOR KUEHNE SPEAKER SERIES	10,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
UNIVERSITY OF TEXAS AT AUSTIN BOX 8058 AUSTIN, TX 78712	NONE	PC	ANNETTE STRAUS INSTITUTE-NEW POLITICS FORUM	68,000
WOODROW WILSON HS COMMUNITY FOUNDATION 100 S GLASSGOW DALLAS, TX 75214	NONE	PC	TEXAS LEADERSHIP PROGRAM	20,000
YMCA ALBUQUERQUE CENTRAL NM 4701 MONTANO RD NM ALBUQUERQUE, NM 87120	NONE	PC	YOUTH AND GOVERNMENT	75,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
TEXAS STATE ALLIANCE OF OF YMCAS 3208 RED RIVER ST AUSTIN, TX 78705	NONE	PC	YOUTH AND GOVERNMENT	173,000
YMCA OKLAHOMA CITY100 W MAIN ST OKLAHOMA CITY, OK 73102	NONE	PC	YOUTH AND GOVERNMENT	90,000
AUSTIN COLLEGE900 N GRAND AVE SHERMAN, TX 75090	NONE	PC	CRIMINAL LAW SYMPOSIUM	1,500
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
LAW FOCUSED EDUCSTATE BAR OF TEXAS 14651 DALLAS PKWY DALLAS, TX 75254	NONE	PC	TEACHER TRAINING INSTITUTE ON THE FOUNDING DOCUMENTS	250,000
LAW FOCUSED EDUCSTATE BAR OF TEXAS 14651 DALLAS PKWY DALLAS, TX 75254	NONE	PC	TEXAS CITIZEN BEE COMPETITION	41,000
NEW MEXICO FIRST 505 MARQUETTE AVE ALBUQUERQUE, NM 87102	NONE	PC	IMPLEMENT PUBLIC EDUCATION AFTER TOWN HALL MEETING	50,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
TEXAS CHRISTIAN UNIVERSITY 2800 S UNIVERSITY DR FORT WORTH, TX 76129	NONE	PC	ıENGAGE SUMMER CIVICS INSTITUTE	23,000
TEXAS TRIBUNE823 CONGRESS AVE AUSTIN, TX 78701	NONE	PC	FESTIVAL, CONVERSATION SERIES & SYMPOSIUMS PUBLIC POLICY EVENTS	155,000
LIBERTAS ACADEMY 33617 E FOWLER AVE TAMPA, FL 33617	NONE	PC	SPRING CIVICS INSTITUTE INSTRUCTION AND CURRICULUM	15,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
CENTER FOR AMERICAN INTERNATIONAL L 5201 DEMOCRACY LANE PLANO, TX 75024	NONE	PC	RULE OF LAW LECTURE SERIES	65,000
COMMUNITIES FOUNDATION OF TEXAS 5500 CARUTH HAVEN LANE DALLAS, TX 75225	NONE	PC	ESTABLISH AT-LARGE SCHOLAR PROGRAM FOR 7 $20,000 SCHOLARSHIPS EACH YEAR	150,000
CONSTITUTING AMERICAPO BOX 1988 COLLEYVILLE, TX 76034	NONE	PC	WE THE PEOPLE 9 17 CONTEST	10,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
FIRST LIBERTY INSTITUTE 2001 PLANO PARKWAY 1600 PLANO, TX 75075	NONE	PC	THREE INTERNSHIPS FOR SUMNERS SCHOLARS	30,000
JUDICIAL WATCH425 THIRD ST 800 WASHINGTON, DC 20024	NONE	PC	INTERNSHIP FOR HWS SCHOLAR	5,000
UNIVERSITY OF NORTH TEXAS FOUN DATI 1155 UNION CIRCLE DENTON, TX 76203	NONE	PC	SUMNERS MPA FELLOWSHIPS	129,163
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
OKLAHOMA CITY UNIVERSITY 2501 BLACKWELDER AVE OKLAHOMA CITY, OK 73106	NONE	PC	ROBERT HENRY TRIBUTE	180
GREATER HOUSTON COMMUNITY FOUNDATIO 515 POST OAK BLVD 1000 HOUSTON, TX 77027	NONE	PC	HURRICANE HARVEY RELIEF	1,750
SOUTHSIDE CHURCH OF CHRIST 1401 SE 25TH AVE MINERAL WELLS, TX 76067	NONE	PC	MEMORIAL GIFT FOR OPPORTUNITY CAMP FUND	1,000
Total . . . . ▶ **3a**				2,332,066

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
AMERICAN PROMISE INC 33 BRADFORD ST CONCORD, MA 01742	NONE	PC	WRITE THE 28TH AMENDMENT TOWNHALLS AT SMU AND OCU LAW SCHOOLS	20,000
Total . . . . ▶ **3a**				2,332,066

TY 2018 Accounting Fees Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 18007218

Software Version: 2018v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	24,650	12,400	0	12,250

TY 2018 Investments - Land Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 18007218

Software Version: 2018v3.1

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Land	279,402		279,402	279,402

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TY 2018 Investments - Other Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 18007218

Software Version: 2018v3.1

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
AMERRA AGRI FUND II LP	FMV	973,733	973,733
WHITEBOX MULTI STRATEGY FUND	FMV	4,826,968	4,826,968
ML-K-18-WP TRUST IV	FMV	66,196	66,196
KAYNE ANDERSON RE PTNR	FMV	83,435	83,435
LINX FUND I LP	FMV	7,399,868	7,399,868
CAPITAL ROY PARTNERS II	FMV	945,482	945,482
TIDELAND ROYALTY TRUST "B"	FMV	5,879	5,879
ORRI GULF OF MEXICO	FMV	862,634	862,634
ORRI OFFSHORE #2	FMV	158,169	158,169
ORRI OKLAHOMA #1	FMV	171,818	171,818
ORRI OKLAHOMA #2	FMV	51,325	51,325
ORRI KANSAS	FMV	69,150	69,150
ORRI LOUISIANA	FMV	11,302	11,302
ORRI TEXAS	FMV	2,631	2,631
ORRI OKLAHOMA #3	FMV	50,416	50,416
ORRI NM #1	FMV	9,799	9,799
ORRI TEXAS #2	FMV	100,834	100,834
ORRI TEXAS #5	FMV	1,590	1,590
ORRI LOUISIANA #2	FMV	435	435
ORRI LOUISIANA # 3	FMV	26,431	26,431
ORRI NM #2	FMV	25,168	25,168
ORRI TEXAS #2	FMV	42,669	42,669
ORRI TEXAS	FMV	76,292	76,292
ORRI LOUISIANA #5	FMV	53,275	53,275
ORRI KANSAS #2	FMV	106,725	106,725
ORRI WYOMING #1	FMV	239,512	239,512
MADISON 1600 VICEROY	FMV	420,726	420,726
BACELINE NOP DEBT III	FMV	285,799	285,799
HERITAGE OFFICE BUILDING (PAR CAPITAL)	FMV	664,550	664,550
PINNACLE IV	FMV	2,238,378	2,238,378

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
AMERRA AGRI FUND III	FMV	1,266,960	1,266,960
HACKBERRY CREEK	FMV	1,588,381	1,588,381
MADISON, LLC	FMV	2,527,962	2,527,962
AMERRA AGR FUND II ANNEX	FMV	1,207,940	1,207,940
PINNACLE V LP	FMV	818,008	818,008
PARR CAPITAL 122 WEST	FMV	2,907,610	2,907,610

TY 2018 Land, Etc. Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 18007218

Software Version: 2018v3.1

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures				18,708
Machinery and Equipment	121,033	102,325	18,708	

TY 2018 Legal Fees Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 18007218

Software Version: 2018v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	27,420	5,296	0	22,124

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TY 2018 Other Expenses Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 18007218

Software Version: 2018v3.1

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONTRACT LABOR	63,875	40,148		23,727
GRAHAM MONTHLY SERVICE FEES	1,475	1,475		
INFORMATION TECHNOLOGY	37,926	21,315		16,611
INSURANCE	24,606	24,606		
INVESTMENT EXPENSES	111,480	111,480		
MISCELLANEOUS	109,157	59,324		49,833
NEWSLETTER PROGRAM	18,583	10,000		8,583
OIL & GAS MAINTENANCE	12,000	12,000		
PARKING	9,237	4,868		4,369
POSTAGE	1,389	583		806

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Rental Expenses	300,975			
REPAIRS & MAINTENANCE	1,300	650		650
SUPPLIES	4,669	2,809		1,860
TELEPHONE	9,798	4,921		4,877

TY 2018 Other Income Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 18007218

Software Version: 2018v3.1

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OIL & GAS ROYALTIES	515,047	515,047	
Pass Through UBI from K-1	-11,302		
Rental Income - Noninvestment Property	382,445		

TY 2018 Other Liabilities Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 18007218

Software Version: 2018v3.1

Description	Beginning of Year - Book Value	End of Year - Book Value
Deferred Excise Taxes	80,368	6,430
EXCISE TAXES PAYABLE	124,741	

TY 2018 Taxes Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 18007218

Software Version: 2018v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	52,012			
PAYROLL TAX	38,110	18,068		20,042