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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

2019

Open to Public Inspection

For calendar year 2019, or tax year beginning 01-01-2019 , and ending 12-31-2019

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) | Room/suite
325 N ST PAUL STREET

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 ▶ ☐

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

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

I Fair market value of all assets at end of year (from Part II, col (c), *line 16)* ▶$ 66,485,850

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)	170,602			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	393,786	393,786		
	4	Dividends and interest from securities	1,074,076	1,074,076		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-191,703			
	b	Gross sales price for all assets on line 6a 7,074,747				
	7	Capital gain net income (from Part IV, line 2)				
	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)	984,800	521,056		
	12	**Total.** Add lines 1 through 11	2,431,561	1,988,918		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	749,362	354,884		394,478
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits	69,675	32,501		37,174
	16a	Legal fees (attach schedule)	12,098	12,073		25
	b	Accounting fees (attach schedule)	24,833	12,416		12,417
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	22,008	28,536		16,955
	19	Depreciation (attach schedule) and depletion	32,947	32,947		
	20	Occupancy	60,929	30,464		30,465
	21	Travel, conferences, and meetings	114,543	4,565		109,978
	22	Printing and publications	4,015			4,015
	23	Other expenses (attach schedule)	525,282	164,011		66,365
	24	**Total operating and administrative expenses.** Add lines 13 through 23	1,615,692	672,397		671,872
	25	Contributions, gifts, grants paid	2,490,980			2,490,980
	26	**Total expenses and disbursements.** Add lines 24 and 25	4,106,672	672,397		3,162,852
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-1,675,111			
	b	**Net investment income** (if negative, enter -0-)		1,316,521		
	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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	175,114	1,095,874	1,095,874
	2 Savings and temporary cash investments	1,462,756	941,851	941,851
	3 Accounts receivable ▶ 206,916			
	Less allowance for doubtful accounts ▶	158,332	206,916	206,916
	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	25,434	31,728	31,728
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	24,086,606	27,914,995	27,914,995
	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	4,825,421	4,177,330	4,177,330
	13 Investments—other (attach schedule)	30,288,050	31,824,413	31,824,413
	14 Land, buildings, and equipment basis ▶ 118,486			
	Less accumulated depreciation (attach schedule) ▶ 105,145	18,708	13,341	13,341
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	61,319,823	66,485,850	66,485,850
Liabilities	17 Accounts payable and accrued expenses	8,501	6,010	
	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 ▶)	6,430	6,430	
	23 **Total liabilities**(add lines 17 through 22)	14,931	12,440	
Net Assets or Fund Balances	**Foundations that follow FASB ASC 958, check here ▶** ☑ **and complete lines 24, 25, 29 and 30.**			
	24 Net assets without donor restrictions	61,304,892		
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ **and complete lines 26 through 30.**			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg , and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 **Total net assets or fund balances** (see instructions)	61,304,892	66,473,410	
	30 **Total liabilities and net assets/fund balances** (see instructions)	61,319,823	66,485,850	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	61,304,892
2	Enter amount from Part I, line 27a	2	-1,675,111
3	Other increases not included in line 2 (itemize) ▶	3	6,843,629
4	Add lines 1, 2, and 3	4	66,473,410
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	66,473,410

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	-191,703
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))
2018	3,072,301	65,280,966	0 04706
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

2	**Total** of line 1, column (d)	2	0 234501
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 046900
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	65,658,851
5	Multiply line 4 by line 3	5	3,079,400
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	13,165
7	Add lines 5 and 6	7	3,092,565
8	Enter qualifying distributions from Part XII, line 4	8	3,162,852

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	13,165
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	13,165
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	13,165
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019 — 6a — 40,000		
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	40,000
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	26,835
11	Enter the amount of line 10 to be **Credited to 2020 estimated tax** ▶ 26,835 **Refunded** ▶	11	

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 2019 or the taxable year beginning in 2019? 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 2019, 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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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 2019?.	**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 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019?. ☐ 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**		
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 2019 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 2019).*	**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 2019?	**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**		
	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**		
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
JANEMARIE CLARK 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	EXEC ASSISTANT 40 00	66,308	9,600	
EILEEN RESNIK 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	PROGRAM DIRECTOR 40 00	100,962	14,625	

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	28,900,006
b	Average of monthly cash balances	1b	1,286,814
c	Fair market value of all other assets (see instructions)	1c	36,471,912
d	**Total** (add lines 1a, b, and c)	1d	66,658,732
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	66,658,732
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	999,881
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	65,658,851
6	**Minimum investment return.** Enter 5% of line 5	6	3,282,943

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	3,282,943
2a	Tax on investment income for 2019 from Part VI, line 5 — 2a: 13,165		
b	Income tax for 2019 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	13,165
3	Distributable amount before adjustments Subtract line 2c from line 1	3	3,269,778
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	3,269,778
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	3,269,778

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	3,162,852
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	3,162,852
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	13,165
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	3,149,687

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				3,269,778
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only.			3,051,680	
b Total for prior years 20____ , 20____ , 20____				
3 Excess distributions carryover, if any, to 2019				
a From 2014.				
b From 2015.				
c From 2016.				
d From 2017.				
e From 2018.				
f **Total** of lines 3a through e.				
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ $ 3,162,852				
a Applied to 2018, but not more than line 2a			3,051,680	
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 2019 distributable amount.				111,172
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2019 *(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 2018 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				3,158,606
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 2014 not applied on line 5 or line 7 (see instructions) . . .				
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2015. . . .				
b Excess from 2016. . . .				
c Excess from 2017. . . .				
d Excess from 2018. . . .				
e Excess from 2019. . . .				

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 2019, 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) 2019	**(b)** 2018	**(c)** 2017	**(d)** 2016	
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**				2,490,980
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	393,786	
4 Dividends and interest from securities. . . .			14	1,074,076	
5 Net rental income or (loss) from real estate					
a Debt-financed property.	531120	191,562			
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					-191,703
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	521,056	
b Pass Through UBI from K-1	531120	-22,724			
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		168,838		1,988,918	-191,703

13 **Total.** Add line 12, columns (b), (d), and (e). 13 1,966,053

(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

******	2020-09-03	******
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr) ☑ Yes ☐ No

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)
VANGUARD INSTITUTIONAL INDEX	P	2018-01-01	2019-02-12
VANGUARD INSTITUTIONAL INDEX	P	2018-01-01	2019-04-01
VANGUARD INSTITUTIONAL INDEX	P	2018-01-01	2019-05-10
VANGUARD INSTITUTIONAL INDEX	P	2018-01-01	2019-05-13
BROADVIEW OPPORTUNITY FUND	P	2018-01-01	2019-06-19
FEDERATED ULTRASHORT BOND	P	2018-01-01	2019-11-05
BROADVIEW OPPORTUNITY FUND	P	2018-01-01	2019-10-31
GRAHAM ASSET SALE	P	2018-01-01	2019-01-01

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)
1,500,000		930,773	569,227
72,200		72,897	-697
33,147		32,218	929
697,980		595,773	102,207
113,029		150,757	-37,728
1,639,980		1,641,807	-1,827
3,013,638		3,842,225	-828,587
4,773			4,773

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	
			569,227
			-697
			929
			102,207
			-37,728
			-1,827
			-828,587
			4,773

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DAVID G DRUMM 901 MAIN STREET STE 500 DALLAS, TX 752023767	Treasurer 2 00	29,000		
JERRY D REIS 6012 W CAMPUS CIRCLE DR 210 IRVING, TX 75063	Chairman 2 00	32,000		
LON R WILLIAMS 2501 N HARWOOD SUITE 1900 DALLAS, TX 75201	VICE CHAIRMAN 2 00	30,500		
SCOTT M HIGGINBOTHAM 125 BELLAIRE AVENUE DUMAS, TX 79029	Director 2 00	26,494		
WILLIAM W MEADOWS 421 W 3RD STREET SUITE 800 FORT WORTH, TX 76102	Director 2 00	16,766		
MIKE MCELROY 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	Controller 40 00	91,154	13,200	
BETH VAN DUYNE 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	Secretary 2 00	8,624		
BRANT C MARTIN 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	Director 2 00	24,869		
T Charles Pierson 325 N ST PAUL ST STE 3920 DALLAS, TX 75201	Executive Dir 40 00	222,692	32,250	

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
BIG BROTHERS BIG SISTERS LONESTAR 450 E JOHN CARPENTER FWY IRVING, TX 75062	NONE	PC	CITIZENSHIP CHARACTER PROGRAM	25,000
THE BILL OF RIGHTS INSTITUTE 200 NORTH GLEBE ROAD ARLINGTON, VA 22203	NONE	PC	CONSTITUTION SEMINAR N M & OK TEACHERS	25,000
Total . . . . ▶ **3a**				2,490,980

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*				
FOUNDATION FOR TEACHING ECONOMICS 260 RUSSELL BLVD DAVIS, CA 95616	NONE	PC	ECONOMICS FOR LEADERS	75,000
FUND FOR AMERICAN STUDIES 1706 NEW HAMPSHIRE AVE WASHINGTON, DC 20009	NONE	PC	UNDERGRAD SCHOLARSHIPS TO WASHINGTON D C	67,000
HOWARD PAYNE UNIVERSITY 1000 FISK STREET BROWNWOOD, TX 76801	NONE	PC	Scholarship Program Development	5,500
Total . . . . ▶ **3a**				2,490,980

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	TEXAS CITIZEN BEE AND WHAT UNITES PROGRAM	341,000
OCU SCHOOL OF LAW 800 N HARVEY AVE OKLAHOMA CITY, OK 73102	NONE	PC	HIGH IDEALS SCHOLARSHIP PREVIEW	15,000
PHILANTHROPY ROUNDTABLE 1730 M STREET NM WASHINGTON, DC 20036	NONE	PC	GENERAL SUPPORT AND ALLIANCE FOR CHARITABLE REFORM	8,000
Total . . . . ▶ **3a**				2,490,980

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	64,230
ST EDWARDS UNIVERSITY 3001 S CONGRESS AVE AUSTIN, TX 78704	NONE	PC	SCHOLARSHIP PROGRAMDEVELOPMENT	18,000
TEXAS CHRISTIAN UNIVERSITY 2800 S UNIVERSITY DR FORT WORTH, TX 76129	NONE	PC	ENGAGE SUMMER CIVICS INSTITUTE	23,000
Total . . . . ▶ **3a**				2,490,980

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 TRIBUNE823 CONGRESS AVE AUSTIN, TX 78701	NONE	PC	FESTIVAL, CONVERSATION SERIES & SYMPOSIUMS ON PUBLIC POLICY	75,000
TEXAS WESLEYAN UNIVERSITY 1201 WESLEYAN ST FORT WORTH, TX 75105	NONE	PC	SUMNERS SCHOLARSHIP ENDOWMENT	6,000
UNIVERSITY OF DALLAS 1845 E NORTHGATE DR IRVING, TX 75062	NONE	PC	SUMNERS SCHOLARSHIP PROGRAM	63,000
Total . . . . ▶ **3a**				2,490,980

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 NORTH TEXAS FOUNDATION 1155 UNION CIRCLE DENTON, TX 76203	NONE	PC	SUPPORT FOR KUEHNE SPEAKER SERIES	35,000
UNIVERSITY OF TEXAS AT AUSTIN BOX 8058 AUSTIN, TX 78712	NONE	PC	ANNETTE STRAUS INSTITUTE	68,000
YMCA ALBUQUERQUE CENTRAL NM 4701 MONTANO RD NM ALBUQUERQUE, NM 87120	NONE	PC	YOUTH AND GOVERNMENT	75,000
Total . . . . ▶ **3a**				2,490,980

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	178,000
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	2,750
Total . . . . ▶ **3a**				2,490,980

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*				
NEW MEXICO FIRST 505 MARQUETTE AVE ALBUQUERQUE, NM 87102	NONE	PC	NEW MEXICO PROGRESS REPORT	50,000
SCHREINER UNIVERSITY 2100 SAN ANTONIO HWY KERRVILLE, TX 78028	NONE	PC	SCHOLARS TUITION	8,000
WORLD AFFAIRS COUNCIL 325 NORTH ST PAUL STREET 4200 DALLAS, TX 75201	NONE	PC	CIVIC PARTICIPATION LECTURE SERIES	39,000
Total . . . . ▶ **3a**				2,490,980

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	300,000
LIBERTAS ACADEMY 33617 E FOWLER AVE TAMPA, FL 33617	NONE	PC	SPRING CIVICS INSTITUTE INSTRUCTION AND CURRICULUM	15,000
CENTER FOR AMERICAN INTERNATIONAL L 5201 DEMOCRACY LANE PLANO, TX 75024	NONE	PC	RULE OF LAW LECTURE SERIES	5,000
Total . . . . ▶ **3a**				2,490,980

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*				
COMMUNITIES FOUNDATION OF TEXAS 5500 CARUTH HAVEN LANE DALLAS, TX 75225	NONE	PC	ESTABLISH AT-LARGE SCHOLAR PROGRAM	495,000
FIRST LIBERTY INSTITUTE 2001 PLANO PARKWAY 1600 PLANO, TX 75075	NONE	PC	THREE INTERNSHIPS FOR SUMNERS SCHOLARS	40,000
AMERICAN PROMISE INC 33 BRADFORD ST CONCORD, MA 01742	NONE	PC	DEMOCRACY SHARETANK	41,000
Total . . . . ▶ **3a**				2,490,980

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*				
ASHBROOK UNIVERSITY 401 COLLEGE AVE ASHLAND, OH 44805	NONE	PC	ASHBROOK CENTER	8,000
BETTER ANGELS SOCIETY 2000 MASSACHUSETTS AVE NW WASHINGTON, DC 20036	NONE	PC	DALLAS POLICY WEEKEND SEMINAR	50,000
CERTELL INC2201 E 46TH STREET 302 INDIANAPOLIS, IN 46205	NONE	PC	GENERAL SUPPORT	15,000
Total . . . . ▶ **3a**				2,490,980

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 THE STUDY OF LIBERTY 11301 N MERIDAN STREET CARMEL, IN 46032	NONE	PC	GENERAL SUPPORT	17,000
GENERATION CITIZENPO BOX 66353 AUSTIN, TX 78766	NONE	PC	GENERAL SUPPORT	30,000
ISSUE ONE1401 K STREET NW 350 WASHINGTON, DC 20005	NONE	PC	CIVICS/GOVERNMENTAL EDUCATION	20,000
Total . . . . ▶ **3a**				2,490,980

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*				
MANHATTEN INSTITUTE FOR POLICY RESE 52 VANDERBUILT AVENUE NEW YORK, NY 10017	NONE	PC	GENERAL SUPPORT	5,000
PAUL QUINN COLLEGE 3838 SIMPSON STUART RD DALLAS, TX 75241	NONE	PC	CIVIC ENGAGEMENT	20,500
THE RIVARD REPORT 126 GONAZLES STREET 100 SAN ANTONIO, TX 78205	NONE	PC	GENERAL SUPPORT	10,000
Total . . . . ▶ **3a**				2,490,980

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*				
TAKE BACK OUR REPUBLIC 246B EAST GLENN AVENUE AUBURN, AL 36830	NONE	PC	GENERAL SUPPORT	20,000
THE POLICY CIRCLE 1189 WILMETTE AVENUE WILMETTE, IL 60091	NONE	PC	GENERAL SUPPORT	2,000
UNIVERSITY OF TEXAS AT DALLAS 800 W CAMPBELL ROAD RICHARDSON, TX 75080	NONE	PC	GENERAL SUPPORT	11,000
Total . . . . ▶ **3a**				2,490,980

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*				
YOUNG VOICES 1342 FLORIDA AVENUE NW WASHINGTON, DC 20009	NONE	PC	GENERAL SUPPORT	5,000
Total . . . . ▶ **3a**				2,490,980

TY 2019 Accounting Fees Schedule

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

EIN: 75-2734032

Software ID: 19009920

Software Version: 2019v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2416	24,833	12,416	0	12,417

TY 2019 Investments - Land Schedule

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

EIN: 75-2734032

Software ID: 19009920

Software Version: 2019v5.0

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

TY 2019 Investments - Other Schedule

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

EIN: 75-2734032

Software ID: 19009920

Software Version: 2019v5.0

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	1,197,543	1,197,543
WHITEBOX MULTI STRATEGY FUND	FMV	3,957,148	3,957,148
ML-K-18-WP TRUST IV	FMV	57,323	57,323
LINX FUND I LP	FMV	7,517,268	7,517,268
CAPITAL ROY PARTNERS II	FMV	503,319	503,319
TIDELAND ROYALTY TRUST "B"	FMV	5,665	5,665
ORRI GULF OF MEXICO	FMV	549,542	549,542
ORRI OFFSHORE #2	FMV	122,875	122,875
ORRI OKLAHOMA #1	FMV	154,334	154,334
ORRI OKLAHOMA #2	FMV	46,076	46,076
ORRI KANSAS	FMV	96,885	96,885
ORRI LOUISIANA	FMV	27,600	27,600
ORRI OKLAHOMA #3	FMV	38,145	38,145
ORRI NM #1	FMV	4,958	4,958
ORRI TEXAS #2	FMV	89,839	89,839
ORRI TEXAS #5	FMV	481	481
ORRI LOUISIANA #2	FMV	385	385
ORRI LOUISIANA # 3	FMV	22,758	22,758
ORRI NM #2	FMV	4,010	4,010
ORRI TEXAS #2	FMV	35,012	35,012
ORRI TEXAS	FMV	80,964	80,964
ORRI LOUISIANA #5	FMV	24,917	24,917
ORRI KANSAS #2	FMV	94,181	94,181
ORRI WYOMING #1	FMV	265,359	265,359
MADISON 1600 VICEROY	FMV	533,013	533,013
BACELINE NOP DEBT III	FMV	269,568	269,568
HERITAGE OFFICE BUILDING (PAR CAPITAL)	FMV	691,052	691,052
PINNACLE IV	FMV	2,765,976	2,765,976
AMERRA AGRI FUND III	FMV	1,417,434	1,417,434
HACKBERRY CREEK	FMV	1,575,583	1,575,583

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MADISON, LLC	FMV	2,331,004	2,331,004
AMERRA AGR FUND II ANNEX	FMV	1,170,122	1,170,122
PINNACLE V LP	FMV	1,420,681	1,420,681
PARR CAPITAL 122 WEST	FMV	2,862,040	2,862,040
AMERRA PIPELINE CAPITAL	FMV	1,550,136	1,550,136
MANOR RV PARK LLC	FMV	275,000	275,000
FEDERATED ULTRASHORT BOND INSTL FULIX	FMV	66,217	66,217

TY 2019 Land, Etc. Schedule

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

EIN: 75-2734032

Software ID: 19009920

Software Version: 2019v5.0

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures				13,341
Machinery and Equipment	118,486	105,145	13,341	

TY 2019 Legal Fees Schedule

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

EIN: 75-2734032

Software ID: 19009920

Software Version: 2019v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	12,098	12,073	0	25

TY 2019 Other Expenses Schedule

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

EIN: 75-2734032

Software ID: 19009920

Software Version: 2019v5.0

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONTRACT LABOR	42,843	21,854		20,989
GRAHAM MONTHLY SERVICE FEES	912	912		
INFORMATION TECHNOLOGY	58,731	21,249		37,482
INSURANCE	15,939	15,939		
INVESTMENT EXPENSES	53,652	53,652		
MISCELLANEOUS	7,604	6,140		1,464
OIL & GAS MAINTENANCE	28,746	28,746		
PARKING	6,607	4,344		2,263
POSTAGE	886	840		46
Rental Expenses	294,906			

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SCHOLARSHIP EXPENSE	247			247
SUPPLIES	6,973	5,747		1,226
TELEPHONE	7,236	4,588		2,648

TY 2019 Other Income Schedule

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

EIN: 75-2734032

Software ID: 19009920

Software Version: 2019v5.0

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OIL & GAS ROYALTIES	521,056	521,056	
Pass Through UBI from K-1	-22,724		
Rental Income - Noninvestment Property	486,468		

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491247000090

TY 2019 Other Liabilities Schedule

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

EIN: 75-2734032

Software ID: 19009920

Software Version: 2019v5.0

Description	Beginning of Year - Book Value	End of Year - Book Value
Deferred Excise Taxes	6,430	6,430

TY 2019 Taxes Schedule

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

EIN: 75-2734032

Software ID: 19009920

Software Version: 2019v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
dallas property tax	1,509	1,509		
EXCISE TAX	23,483			
PAYROLL TAX	32,522	15,567		16,955
taxes-land	11,460	11,460		

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF
▶ Go to *www irs gov/Form990* for the latest information

OMB No 1545-0047

2019

Name of the organization	Employer identification number
HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC	75-2734032

Organization type (check one)

Filers of: **Section:**

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☑ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization	Employer identification number
HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC	75-2734032

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	See Additional Data Table	$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)

Name of organization	Employer identification number
HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC	75-2734032

Part II **Noncash Property**

(see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

Name of organization	Employer identification number
HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC	75-2734032

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once. See instructions.) ▶ $**

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

Additional Data

Software ID: 19009920
Software Version: 2019v5.0
EIN: 75-2734032
Name: HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC

Form 990 Schedule B, Part I - Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	GRAHAM MORTGAGE 3838 OAK LAWN AVE 1250 DALLAS, TX 75219	$ 10,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
2	WICK PHILLIPS 100 THROCKMORTON ST 1500 FORT WORTH, TX 76102	$ 5,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
3	PROPERTY ADVISORS REALTY INC 2201 W ROYAL LANE 165 IRVING, TX 75063	$ 5,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
4	SCOTT HIGGINBOTHAM 125 BELLAIRE AVE DUMAS, TX 79029	$ 10,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
5	MATADOR RESOURCES COMPANY 5400 LBJ FRWY 1500 DALLAS, TX 75240	$ 5,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
6	INWOOD NATIONAL BANK 7621 INWOOD ROAD DALLAS, TX 75209	$ 5,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)

Form 990 Schedule B, Part I - Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	LOCKE LORD LLP 2200 ROSS AVE DALLAS, TX 75201	$ 5,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
8	STATE BAR OF TEXAS 14651 DALLAS PKWY 925 DALLAS, TX 75254	$ 5,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
9	MARLIN CONTROLS INC 11011 REGENCY CREST DR 200 DALLAS, TX 75238	$ 11,500	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
10	KPOST ROOFING 1841 W NORTHWEST HWY DALLAS, TX 75220	$ 15,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)