Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

OMB No. 1545-0052

2008

For calendar year 2008, or tax year beginning August 1 **, 2008, and ending** July 31 **, 20** 09

G Check all that apply: ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation: Albert and Elaine Borchard Foundation, Inc.

Number and street (or P O. box number if mail is not delivered to street address): 22055 Clarendon Street — Room/suite: 210

City or town, state, and ZIP code: Woodland Hills, California 91367

A Employer identification number: 95-3294377

B Telephone number (see page 10 of the instructions): (818) 888-2871

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

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

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)* ▶ $ 23,375,667

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

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 page 11 of the 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)				
	2 Check ▶ ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	54,414	8,713		
	4 Dividends and interest from securities	111,215	100,210		
	5a Gross rents	1,824,061	1,824,061		
	b Net rental income or (loss) $1,474,691				
	6a Net gain or (loss) from sale of assets not on line 10	(3,237)			
	b Gross sales price for all assets on line 6a 500,152				
	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) 1a	14,252	11,818		
	12 **Total.** Add lines 1 through 11	2,000,705	1,944,802		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	178,437	146,782		31,655
	14 Other employee salaries and wages	71,896	59,142		12,754
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) 1	782	643		139
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule) 1	25,988	21,378		4,610
	17 Interest	33	33		
	18 Taxes (attach schedule) (see page 14 of the instructions) Schedule 1	189,978	156,276		33,702
	19 Depreciation (attach schedule) and depletion 3	43,432	43,432		
	20 Occupancy	22,271	18,320		3,951
	21 Travel, conferences, and meetings	24,573	20,214		4,359
	22 Printing and publications				
	23 Other expenses (attach schedule) 1	236,561	145,822		90,739
	24 **Total operating and administrative expenses.** Add lines 13 through 23	793,951	612,042		181,909
	25 Contributions, gifts, grants paid	1,262,693			1,262,693
	26 **Total expenses and disbursements.** Add lines 24 and 25	2,056,644	612,042		1,444,602
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	(55,939)			
	b **Net investment income** (if negative, enter -0-)		1,332,760		
	c **Adjusted net income** (if negative, enter -0-)				

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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	21,549	86,505	86,505
2 Savings and temporary cash investments	1,538,270	1,576,106	1,576,106
3 Accounts receivable ▶			
Less: allowance for doubtful accounts ▶			
4 Pledges receivable ▶			
Less: allowance for doubtful accounts ▶			
5 Grants receivable			
6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the 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			
10a Investments—U.S. and state government obligations (attach schedule) 2a	987,083	733,841	790,853
b Investments—corporate stock (attach schedule)			
c Investments—corporate bonds (attach schedule)			
11 Investments—land, buildings, and equipment basis ▶ 10,525,857			
Less: accumulated depreciation (attach schedule) ▶ 6,317,020	4,268,593	4,208,837	16,343,891
12 Investments—mortgage loans			
13 Investments—other (attach schedule) 2	2,636,490	2,758,864	2,718,312
14 Land, buildings, and equipment: basis ▶			
Less: accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶ Education Center)	614,547	440,547	1,860,000
16 **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	10,066,532	9,804,700	23,375,667
Liabilities			
17 Accounts payable and accrued expenses			
18 Grants payable			
19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons			
21 Mortgages and other notes payable (attach schedule)			
22 Other liabilities (describe ▶)			
23 **Total liabilities** (add lines 17 through 22)			
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			
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	8,623,928	8,418,035	
28 Paid-in or capital surplus, or land, bldg., and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds	1,442,604	1,386,665	
30 **Total net assets or fund balances** (see page 17 of the instructions)	10,066,532	9,804,700	
31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	10,066,532	9,804,700	

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	10,066,532
2 Enter amount from Part I, line 27a	2	(55,939)
3 Other increases not included in line 2 (itemize) ▶ security deposits (Schedule 2b)	3	6,260
4 Add lines 1, 2, and 3	4	10,016,853
5 Decreases not included in line 2 (itemize) ▶ see Schedule 2b	5	212,153
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	9,804,700

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	U.S. Treasury Note due 06-15-09	P	06-18-04	06-15-09
b	GNMA Pool 047687 X due 07-15-11	P	1983	05-13-09
c	GNMA Pool 043758X due 11-15-10	P	1983	05-13-09
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	500,000		503,222	(3,222)
b	52		59	(7)
c	100		108	(8)
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				
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	(3,237)
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 pages 13 and 17 of the 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 page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2007	1,190,462	20,514,808	0.58029
2006	984,336	19,463,451	0.50574
2005	983,955	19,188,085	0.51279
2004	860,276	19,034,445	0.45195
2003	821,955	18,993,248	0.43276

2 **Total** of line 1, column (d)	2	2.48353
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.49670
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	19,635,310
5 Multiply line 4 by line 3	5	975,286
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	13,328
7 Add lines 5 and 6	7	988,614
8 Enter qualifying distributions from Part XII, line 4	8	1,444,602

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 on page 18.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling letter: .... **(attach copy of ruling 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	13,328	
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	13,328	
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	13,328	
6 Credits/Payments:			
a 2008 estimated tax payments and 2007 overpayment credited to 2008 — 6a — 12,274			
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	12,274	
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	1,054	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10		
11 Enter the amount of line 10 to be: **Credited to 2009 estimated tax** ▶ **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		✓
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		✓
*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		✓
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		✓
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		✓
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		✓
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	✓	
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	✓	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ California			
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	✓	
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 2008 or the taxable year beginning in 2008 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		✓
10 Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

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 page 20 of the instructions)	11		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	

Website address ▶

14 The books are in care of ▶ Heidi Galke Telephone no. ▶ 818 888-2871

Located at ▶ 22055 Clarendon Street # 210, Woodland Hills, California ZIP+4 ▶ 91367-6355

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 |

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 page 20 of the instructions)?	1b		✓
	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 2008?	1c		✓
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 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? ☐ 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 page 20 of the 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 2008 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 2008.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✓
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 2008?	4b		✓

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the 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 page 22 of the 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 you answered "Yes" to 6b, also 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** | |

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 page 22 of the 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 Schedule 4		178,437		

2 *Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions).* If none, enter "NONE."

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

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

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 page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
Heidi Galke 22055 Clarendon Street # 210, Woodland Hills, Ca. 91367	secretary/treasurer, adm. ass't	71,896

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 page 23 of the 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 page 24 of the instructions. 3	
Total. Add lines 1 through 3 ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	2,242,737
b	Average of monthly cash balances	1b	1,347,697
c	Fair market value of all other assets (see page 24 of the instructions)	1c	16,343,891
d	**Total** (add lines 1a, b, and c)	1d	19,934,325
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	19,934,325
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	299,015
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	19,635,310
6	**Minimum investment return.** Enter 5% of line 5	6	981,766

Part XI **Distributable Amount** (see page 25 of the 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	981,766
2a	Tax on investment income for 2008 from Part VI, line 5	2a	13,328		
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	13,328
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	968,438
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	968,438
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	968,438

Part XII **Qualifying Distributions** (see page 25 of the 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	1,444,602
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	1,444,602
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 page 26 of the instructions)	5	13,328
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,431,274

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 page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1	Distributable amount for 2008 from Part XI, line 7				968,438
2	Undistributed income, if any, as of the end of 2007:				
a	Enter amount for 2007 only			49,266	
b	Total for prior years: 20____,20____,20____				
3	Excess distributions carryover, if any, to 2008:				
a	From 2003				
b	From 2004				
c	From 2005				
d	From 2006				
e	From 2007				
f	**Total** of lines 3a through e				
4	Qualifying distributions for 2008 from Part XII, line 4: ▶ $ 1,444,602				
a	Applied to 2007, but not more than line 2a			49,266	
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d	Applied to 2008 distributable amount				1,395,336
e	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2008. *(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 page 27 of the instructions				
e	Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions				
f	Undistributed income for 2008. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2009				(426,898)
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8	Excess distributions carryover from 2003 not applied on line 5 or line 7 (see page 27 of the instructions)				
9	**Excess distributions carryover to 2009.** Subtract lines 7 and 8 from line 6a				
10	Analysis of line 9:				
a	Excess from 2004				
b	Excess from 2005				
c	Excess from 2006				
d	Excess from 2007				
e	Excess from 2008				

Part XIV Private Operating Foundations (see page 27 of the 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 2008, enter the date of the ruling . . . . ▶

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

	Tax year	Prior 3 years			
	(a) 2008	(b) 2007	(c) 2006	(d) 2005	(e) Total
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 ⅔ 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 page 27 of the instructions.)

1 **Information Regarding Foundation Managers:**

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

None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

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

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

Albert and Elaine Borchard foundation, 22055 Clarendon St. # 210, Woodland Hills, California 91367

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

six copies of written grant proposals and copy of tax exempt letter

c Any submission deadlines: none

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

NO GRANTS TO INDIVIDUALS

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 Schedule 5				**1,262,693**
Total . . . . ▶ **3a**				**1,262,693**
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)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See page 28 of the instructions.)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)					

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

(See worksheet in line 13 instructions on page 28 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 page 28 of the instructions.)
	not applicable

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) of the Code (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)		✓
(2) Other assets	1a(2)		✓
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
(3) Rental of facilities, equipment, or other assets	1b(3)		✓
(4) Reimbursement arrangements	1b(4)		✓
(5) Loans or loan guarantees	1b(5)		✓
(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

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) of the Code (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 or fiduciary) is based on all information of which preparer has any knowledge

Heidi Galke 12-10-09 Secretary / Treasurer (CFO)

Signature of officer or trustee HEIDI GALKE | Date | Title

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed ► ☐	Preparer's identifying number (see **Signature** on page 30 of the instructions)
Firm's name (or yours if self-employed), address, and ZIP code		EIN ►	Phone no. ( )

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2009
Tax ID No. 95-3294377

SCHEDULE 1

	AMOUNT
LEGAL FEES	
LOEB & LOEB, LLP	
legal services re consultation records requirements,	
compensation issues, reimb. for Westlaws	**$ 781.80**
TTOTAL LEGAL FEES:	**$ 781.80**
OTHER PROFESSIONAL FEES	
ANUPAMA VENKATESH	
preparation of Gaap financial statements fiscal 2008	$ 1,110.00
preparation of Gaap financial statements to 11-15-08	272.95
ROTHSTEIN/KASS, CPA	
retainer for audit services 07-31-09 financial statements	5,000.00
balance for audit of 07-31-08 financial statements	19,605.00
TOTAL OTHER PROFESSIONAL FEES:	**$ 25,987.95**
TAXES	
LOS ANGELES COUNTY TAX COLLECTOR -	
2008/2009 real property taxes	$ 175,431.91
OFFICE OF FINANCE, CITY OF	
LOS ANGELES	
business taxes for rental properties for 2009	2,272.10
Estimated excise tax for fiscal year ended 07-31-09	12,000.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2009
Tax ID No. 95-3294377

	AMOUNT
payment on account of excise tax for fiscal year ended 07-31-09 – book entry (credit of overpayment fiscal 07-31-08)	274.00
TOTAL TAXES:	**$189,978.01**

TRAVEL/CONFERENCES/MEETINGS

Disbursed to JANNA BELING	
reimbursement for costs advanced for car rental in Missillac re summer conferences 2008, limo service	4,302.60
reimbursement for postage re proposals, airfare for 2009 conference in Missillac	1,540.40
Disbursed to EDWARD D. SPURGEON	
reimbursement for costs 05-30-08 to 10-31-08 for airfare to Los Angeles for may board meeting, several meetings re real estate properties and audit, etc., hotel, business luncheons, car rentals	2,556.29
reimbursement for costs 12-11-08 to 05-06-09 for airfare to Los Angeles for board meetings, special meetings re real estate, etc., hotel, business lunches, car rentals	3,972.02
Disbursed to MICHAEL SPURGEON	
reimbursement for costs advanced re December 08 board meeting	456.63
reimbursement for costs advanced re may 15, 2009 board meeting, airline, hotel, airport parking	335.20
Disbursed to STEPHEN SPURGEON	
reimbursement for costs advanced re 05-15-09 board meeting, airfare Portland to Los Angeles to Portland, car rental	533.30

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2009
Tax ID No. 95-3294377

		AMOUNT
Disbursed to		
KRISTEN BELING		
reimbursement for costs advanced for		
postage, office supplies, board meeting Dec. 2008		
and May 2009, airfare, hotel & car rental		1,432.25
reimbursement for costs advanced re Education		
Center 2008 conferences		5,190.45
2009 airfare to France as conference director		4,254.03
TOTAL TRAVEL/CONFERENCES/MEETINGS:	**$**	**24,573.17**

OTHER EXPENSES

The Gas Co. – 1104 S. Lawrence	$	855.38
Gene V. Pira, Inc. – 1899 Sacramento Street		
Reg. 4 fire sprinkler system repair work		2,800.00
Villarreal Trucking – reimbursement for repairs		
at 1104 Lawrence Street		2,965.00
Cushman & Wakefield – rental appraisal fee for		
1104 Lawrence and 1101-1131 Mateo Street		1,000.00
fixed lease commission for extension of lease		
with Villarreal Trucking – 1104 Lawrence Street		2,500.00
Precision Refrigeration & Airconditioning – inspection		
fee re refrigeration equipment		541.25
United Melon – reimbursement for overpayment of rent		
for 1104 Lawrence Street 11-01-08 to 02-28-09		1,540.00
Rooftoppers, Inc. – roof repairs at		
1104 Lawrence Street		3,800.00
1101-1131 Mateo Street		11,600.00
1899 Sacramento Street		9,500.00
1805 Sacramento Street		450.00
Thermal Comfort Systems – remove and reinstall heating/AC		
equipment on roof at 1102 Lawrence Street and electrical repairs		6,500.00
Property insurance		127,613.84

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2009
Tax ID No. 95-3294377

	AMOUNT
Miscellaneous office expenses (telephone, storage, Federal express, supplies, bank charges, postage, UBS Financial Services fee, filing fees, etc.)	5,604.80
Education Center operating expenses, conference expenses	53,568.81
Center on Law & Aging operating expenses	5,722.33
TOTAL OTHER EXPENSES:	**$ 236,561.41**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2009
Tax ID No. 95-3294377

SCHEDULE 1a

OTHER INCOME

	AMOUNT
Athens First Bank – refund of bank charges	$ 32.00
Robert G. Cox Insurance Service – return premium re increase in commercial coverage – overpayment	1,939.72
U.S. Treasury – refund of overpayment of excise tax for fiscal tax year 07-31-08 – book entry (credited to 07-31-09)	274.00
Precision Refrigeration, Inc. – refund re refrigeration inspection fee of 1899 Sacramento Street	166.25
Vanguard Intermediate Term Treasury Fund – long-term capital gain distribution	2,433.99
IVY Global Natural Resources Fund Cl. A – long-term capital gain distribution	9,405.99
TOTAL OTHER INCOME:	$ 14,251.95

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED 07-31-2009
Tax ID No. 95-3294377

SCHEDULE 2

OTHER INVESTMENTS

	COST	**MARKET VALUE**
8,120.024 shares VANGUARD INTERMEDIATE TERM TREASURY FUND	$ 89,094.62	$ 93,217.88
142,925.940 shares VANGUARD GNMA FUND-Admiral	$ 1,483,616.40	$ 1,525,019.78
17,584.579 shares VANGUARD INFLATION PROTECTED SEC. FUND – Admiral	$ 422,053.68	$ 420,271.44
58,696.362 shares VANGUARD SHORT-TERM INVESTMENT GRADE FUND-Admiral	$ 625,297.25	$ 608,681.27
4,524.288 shares IVY GLOBAL NATURAL RESOURCES FUND CL.A	$ 138,802.29	$ 71,121.80
TOTAL OTHER INVESTMENTS:	**$ 2,758,864.24**	**$ 2,718,312.17**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED JULY 31, 2009
Tax ID No. 95-3294377

SCHEDULE 2a

U.S. TREASURY NOTES		ADJUSTED COST		MARKET VALUE
$ 500,000 face value U.S. Treasury Note due 02-15-14, YTM 4.409%	$	483,860.72	$	535,940.00
$ 250,000 face value U.S. Treasury Note due 08-13-10, YTM 2.375%	$	249,980.66	$	254,912.50
TOTAL U.S. TREASURY NOTES:	$	733,841.38	$	790,852.50

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2009
Tax ID no. 95-3294377

SCHEDULE 2b

PART III – LINE 3

OTHER INCREASES

	AMOUNT
Security deposits	$ 6,260
TOTAL OTHER INCREASES:	$ 6,260

PART III – LINE 5

OTHER DECREASES

Security deposit refunded to tenant at 1104 Lawrence St.	$ 385
Unrealized exchange rate loss Euro Dollar to US Dollar as of 07-31-09	3,405
Reduce cost basis of Education Center, Missillac, France for cash refund received during fiscal 07-31-08 – funds not used for originally planned refurbishments	174,000
Reduce cost basis of various improvements to 1900 Sacramento Street 7 parking lot due to refund received from Union Pacific	34,363
TOTAL OTHER DECREASES:	$ 212,153

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED 07-31-2009
TAX ID NO. 95-3294377

SCHEDULE 3 - DEPRECIATION

Description	Acquired	Cost	Deprec. Base	Deprec. Prior Yrs	Remaining Cost	Deprec. This Year
Fax Sharp UX120	06-04-94	847	847	847	-	-
Office fixt.	various	13,603	13,603	13,603	-	-
1805/1811 Sacramento	03-31-86	706,281	378,226	378,226	-	-
1805 Sacr.- light fixtures	04-07-97	5,620	5,620	4,500	1,120	375
1899 Sacramento	03-31-86	690,770	457,884	457,884	-	-
1900 Sacramento	03-31-86	3,241,790	1,947,460	1,947,460	-	-
railroad spur – 1900 Sacramento	03-31-86	30,033	-	-	-	-
1101-1131 Mateo St.	03-31-86	2,491,650	1,386,956	1,386,956	-	-
roof-Mateo	03-31-86	43,040	43,040	43,040	-	-
refrigeration equipment – Mateo St.	07-31-96	38,000	38,000	30,396	7,604	2,533
1104 Lawrence Street	03-31-86	1,060,000	1,060,000	1,060,000	-	-
roof – 1900 Sacramento Street	05-20-92	160,563	160,563	160,563	-	-
various improvements to 1900 Sacr. & parking lot	1995	332,828 less34,363= 298,465	298,465	310,647	(12,182)	(12,182)
Lot 8th & Wilson	08-11-93	589,518	-	-	-	-
Lot 8th & Lemon	01-07-97	94,919	-	-	-	-

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED 07-31-2009
TAX ID NO. 95-3294377

Description	Acquired	Cost	Deprec. Base	Deprec. Prior Yrs.	Remaining Cost	Deprec. This Year
Fence for 8th & Lemon	12-26-98	5,975	5,975	5,975	-	-
Construct. costs re seismic retrofit of bldgs at 1805/11/99 Sacramento & 1104 Lawrence/1101-1131 Mateo St.	1996/97/98	194,952	194,952	155,780	39,172	12,997
new roof at 1104 Lawrence	1998	55,881	55,881	40,975	14,906	3,725
new roof at 1102 Lawrence	04-07-09	14,450	14,450	-	14,450	963
new roof at 1101-1131 Mateo	1998/99	121,182	121,182	88,776	32,406	8,100
new roof at 1805 Sacramento	03-31-99	18,876	18,876	12,580	6,296	1,258
new roof at 1811 Sacramento	03-24-00	30,206	30,206	18,126	12,080	2,014
new roof at 1899 Sacramento	06-30-03	45,592	45,592	18,234	27,358	3,039
new asphalt paving – Mateo	09-24-99	24,500	24,500	14,697	9,803	1,633
new asphalt paving – 1805/11 Sacramento	02-05-01	24,123	24,123	12,864	11,259	1,608
rolling steel doors – 1805 Sacramento	06-01-01	9,931	9,931	9,931	-	-

Description	Acquired	Cost	Deprec. Base	Deprec. Prior Years	Remaining Cost	Deprec. This Year
heat/aircond. unit 1102 Lawrence	01-22-01	6,200	6,200	6,200	-	-
heat/aircond. unit 1104 Lawrence, 2nd Fl.	03-04-02	5,250	5,250	5,250	-	-
two Dell computers & access. Insp. 5000 & XPST700	2000	13,014	13,014	13,014	-	-
Dell lap top computer	2002	3,339	3,339	3,339	-	-
Filing cabinets	06-02-09	3,589	3,589	-	3,589	718
new office/bath – 1805 Sacramento	08-20-01	14,894	14,894	6,951	7,943	993
new asphalt job-parking lot 1104 Lawrence	11-28-03	62,134	62,134	20,710	41,424	4,142
1900 Sacramento new asphalt paving	01-26-05	72,730	72,730	19,396	53,334	4,849
1900 Sacramento tenant improvements	12-30-04 and various	100,000	100,000	26,668	73,332	6,667
1900 Sacramento – 6,684 sq. ft. acqd.-driveway property	06-01-07	**233,940**	-	-	-	-
TOTALS:		**10,525,857**	-	**6,273,588**	-	**43,432**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2009
Tax ID No. 95-3294377

SCHEDULE 4

ATTACHMENT TO PART VIII, LINE 1

NAME AND ADDRESS	TITLE	TIME	COMPENSATION
Edward D. Spurgeon c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director/ President	part- time	$ 64,000
Willard A. Beling c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director/ Chairman of the Board	part- time	$ 20,000
Janna Beling c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director, Exec. Vice President	part- time	$ 34,000
Kristen Beling c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director	part- time	$ 24,000
Michael Spurgeon c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director	part- time	$ 19,000
Stephen Spurgeon c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, Ca. 91367	Director	part- time	$ 14,000
Heidi Galke c/o Foundation office 22055 Clarendon St., # 210 Woodland Hills, Ca. 91367	Director	part- time	$ 3,437
TOTAL LINE 1 PART VIII			**$ 178,437**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2009
Tax ID No. 95-3294377

SCHEDULE 5

		AMOUNT
	GRANTS	
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (IRVINE) 111 Academy Way # 210 Irvine, California 92697-1050	
08-06-08	research grant for Prof. John Culbert, scholar-in-residence at Education Center, Missillac, France – fall semester 2008	$ 30,000.00
	Disbursed to AMERICAN RED CROSS DISASTER RELIEF FUND P.O. Box 37243 Washington, DC 20013	
09-30-08	grant for Hurricane IKE victims	25,000.00
	Disbursed to U.S.C./THORNTON SCHOOL OF MUSIC los Angeles, California 90089-0851	
11-03-08	grant in support of music programs	5,000.00
	Disbursed to AMERICAN RED CROSS OF GREATER LOS ANGELES 11355 Ohio Avenue Los Angeles, California 90025	
11-23-08	grant for local disaster relief as result of recent wild fires (Sayre)	25,000.00
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (UC IRVINE) 111 Academy Way # 210 Irvine, California 92697-1050	
12-16-08	grant for research by Prof. Daniel Brunstetter – scholar- in residence during spring semester 2009 at Education Center	30,000.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2009
Tax ID No. 95-3294377

		AMOUNT
12-16-08	Disbursed to THE FOODBANK OF SOUTHERN CALIFORNIA 1444 San Francisco Ave. Long Beach, California 90813 grant in support of Food Distribution Program for the poorest of poor in Los Angeles	$ 25,000.00
12-16-08	Disbursed to CHILDREN'S HUNGER FUND P.O. Box 7085 Mission Hills, California 91346-7085 grant for "Kids Eat Right Nutrition Program"	5,000.00
12-16-08	Disbursed to RESCUE MISSION ALLIANCE (VALLEY FOOD BANK) 12701 Van Nuys Boulevard, Suite A Van Nuys, California 91409-8073 grant to feed hurting, hungry and struggling families	5,000.00
12-16-08	Disbursed to UNION RESCUE MISSION 545 S. San Pedro Los Angeles, California 90013 grant to feed hungry and poor	5,000.00
12-16-08	Disbursed to LOS ANGELES MISSION 303 E. 5^{th} Street Los Angeles, California 90013 grant to help provide food and shelter to homeless men and women	5,000.00
12-16-08	Disbursed to PET ADOPTION FUND 7515 Deering Avenue Canoga Park, California 91303 grant to help homeless and abused animals	2,000.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2009
Tax ID No. 95-3294377

Date		AMOUNT
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Von Klein Smid Center 351 Los Angeles, California 90089-0047	
12-21-08	grant for Borchard Overseas Dissertation Research Fellowship for academic year 2009/2010	25,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Los Angeles, California 90089-4353	
12-21-08	grant for Russian Exchange Program	15,000.00
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (UCSB) Santa Barbara, California 93106-2080	
12-21-08	grant for Borchard Foundation European Studies Fellowship	25,000.00
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (UCSB) Santa Barbara, California 93106-5030	
12-21-08	grant to help with presentation of Ballet Preljocaj – Les 4 Saisons"	5,000.00
	Disbursed to SUSTAINABLE FAIRFAX 141 Bolinas Road Fairfax, California 94930	
12-21-08	grant to help create and distribute a guide for other grass-roots organizations to follow	5,000.00
	Disbursed to PLANNED PARENTHOOD LOS ANGELES 1920 Marengo Street Los Angeles, California 90033-1317	
12-21-08	grant in support of health, education & community outreach programs	20,000.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2009
Tax ID No. 95-3294377

		AMOUNT
	Disbursed to HOUSE EAR INSTITUTE 2100 West Third Street Los Angeles, California 90057	
12-21-08	grant in support of Children's Research program	$ 10,000.00
	Disbursed to STUDENTS RUN AMERICA 6505 Zelzah Avenue Reseda, California 91335	
12-21-08	grant for SRLA scholarship program for 2009	8,000.00
	Disbursed to NATIONAL MULTIPLE SCLEROSIS SOCIETY (SOUTH. CALIF. CHAPTER) 2440 S. Sepulveda Boulevard, Suite 115 Los Angeles, California 90064	
12-21-08	grant in support of Educ. Scholarship Program for Individuals Affected by MS 2008/09 school year	5,000.00
	Disbursed to National Senior Citizens Law Center 1444 Eye Street, N.W., Eleventh Floor Washington, D.C. 20005	
12-21-08	grant for medicare Part D Coverage Instability Project	25,000.00
	Disbursed to THE POET TREE, INC. (Sacramento Poetry Center) 1719 25th Street Sacramento, California 95816	
12-21-08	grant for one new project $ 3,000; grant to solidify and improve existing projects per 11-27-08 proposal $ 6,000	9,000.00
	Disbursed to WISCONSIN HISTORICAL FOUNDATION 816 State Street Madison, Wisconsin 53726-0050	
12-21-08	grant in support of programs	500.00

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		AMOUNT
	Disbursed to CHALLENGED ATHLETES' FOUNDATION P.O. Box 910764 San Diego, California 92191-0769	
12-21-08	grant in support of programs	$ 25,000.00
	Disbursed to HEALTH VOLUNTEERS OVERSEAS 1900 L. Street N.W., Suite 310 Washington, D.C. 20036	
12-21-08	grant to help enhance use of information technology, for knowledge management, education & communication	25,000.00
	Disbursed to OREGON HEALTH & SCIENCE UNIVERSITY 31815 S.W. Sam Jackson Park Road Portland, Oregon 97239-3098	
12-21-08	grant for 2009 Oregon Head & Neck Awareness & Free Screening Day	3,000.00
	Disbursed to LEGAL SERVICES OF NORTHERN CALIFORNIA 444 North 3rd Street # 312 Sacramento, California 95811	
12-28-08	grant – one-time support for Senior Legal Hotline	35,000.00
	Disbursed to SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN FRANCISCO Civic Center Courthouse 400 McAllister, Room 205 San Francisco, California 94102	
01-20-09	research grant for "Undue Influence: Definitions and Applications"	20,000.00

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		AMOUNT
	Disbursed to UNIVERSITY OF TEXAS MEDICAL SCHOOL AT HOUSTON 6431 Fannin Street, Suite 4200 Houston, Texas 77030	
01-23-09	research grant "Forensic Markers" (Dyer)	$ 20,000.00
	Disbursed to SUNNY HILLS SERVICES 300 Sunny Hills Drive San Anselmo, California 94960	
01-28-09	grant in support of Bay Area Youth Centers program	20,000.00
	Disbursed to DISABILITY RIGHTS WISC.	
02-08-09	research grant for "Individual At Risk Restraining Order" (Abramson)	14,700.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Los Angeles, California 90089-1147	
04-06-09	grant for conference on "Caught in the Act: Rethinking the History of Photo Journalism" at Education Center 06-21 to 06-24-09	35,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Stonier Hall 330 Los Angeles, California 90089-1147	
04-06-09	grant for conference on "Pubertal Development, Stress & Health" at Education Center 06-28 to 07-01-09	35,000.00

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		AMOUNT
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (UCSB) 3227 Cheadle Hall Santa Barbara, California 93106-2050	
04-06-09	grant for conference on "High School Dropout & Graduation – International Comparisons" at Education Center 06-14 to 06-17-09	$ 35,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Thornton School of Music Los Angeles, California 90089-0851	
04-10-09	grant for Performing Arts Workshop by Prof. Peter marsh to be held at Education Center 08-15 to 08-20-09	35,000.00
	Disbursed to CALIFORNIA STATE UNIVERSITY NORTHRIDGE 18111 Nordhoff Street Northridge, California 91330-8411	
04-11-09	second installment of $ 30,000 grant to provide scholarships for travel for eight graduate physical therapist students	10,000.00
	Disbursed to THE SMILE TRAIN 41 Madison Avenue, 28th Fl. New York, N.Y. 10010-2202	
05-25-09	grant for free cleft surgery for 80 children	20,000.00
	Disbursed to UNIVERSITY OF THE PACIFIC/ MCGEORGE SCHOOL OF LAW 3200 Fifth Avenue Sacramento, California 95817	
05-25-09	grant for five projects within Institute for Laws of Health and Aging per proposal 04-27-09	50,000.00

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		AMOUNT
	Disbursed to CARE 369 Pine Street # 700 San Francisco, California 94104	
05-25-09	grant for project "Microfinance for Vulnerable Populations: Mitigating Economic Crisis in Thailand	$ 15,000.00
	Disbursed to SOUTHERN CENTER FOR HUMAN RIGHTS 83 Poplar Street, N.W. Atlanta, Georgia 30303	
05-25-09	grant in support of Human Rights Internship project	10,000.00
	Disbursed to VENICE FAMILY CLINIC 604 Rose Avenue Venice, California 90291	
05-25-09	grant to help provide oral health care for most vulnerable people in community	10,000.00
	Disbursed to PRINCETON UNIVERSITY Box 46 Princeton, NJ 08544-0046	
05-25-09	grant for annual giving – Cl. 1947	1,000.00
05-25-09	grant for annual giving – Cl. 1961	1,000.00
	Disbursed to BOOKENDS 6520 Platt Avenue # 331 West Hills, California 91307	
05-25-09	grant in support of "Kids Helping Kids for Literacy" program	6,000.00

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		AMOUNT
	Disbursed to YOUTH NEWS SERVICE LOS ANGELES BUREAU 5967 West Third Street, Suite 301 los Angeles, California 90036	
05-25-09	grant in support of summer 09 Writing & Graphic Arts Workshop	$ 5,000.00
	Disbursed to PROJECT DIGNITY 12020 Chapman Avenue # 257 Garden Grove, California 92840	
05-25-09	grant to help poor families move into permanent housing	5,000.00
	Disbursed to UNITED WAY OF VENTURA COUNTY 800 S. Victoria Avenue # 1900 Ventura, California 93009	
05-25-09	grant for Ventura Homeless Prevention Fund in support of their programs	10,000.00
	Disbursed to PET ADOPTION FUND 7515 Deering Avenue Canoga Park, California 91303	
05-25-09	grant to help abused and abandoned animals to be adopted	5,000.00
	Disbursed to YOUNG & HEALTHY 37 N. Holliston Avenue Pasadena, California 91106	
05-25-09	grant in support of core programs for Pasadena's neediest children	15,000.00
	Disbursed to SACRAMENTO AREA EMERGENCY HOUSING CENTER 2411 Alhambra Boulevard # 110 Sacramento, California 95817	
05-25-09	grant to help fund 2/3rds of cost of case manager for the Family Shelter	20,000.00

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		AMOUNT
	Disbursed to FIVE ACRES-THE BOYS & GIRLS AID SOCIETY OF LOS ANGELES COUNTY 760 West Mountain View Street Altadena, California 91001-4996	
05-25-09	grant to help with operating costs for Grace Center, the domestic violence prevention and services program	$ 10,000.00
	Disbursed to JUNIOR BLIND OF AMERICA 5300 Angeles Vista Boulevard Los Angeles, California 90043	
05-25-09	grant for nine blind or visually impaired children to attend Camp Bloomfield	7,500.00
	Disbursed to INDEPENDENT ADOPTION CENTER 391 Taylor Boulevard # 100 Pleasant Hills, California 94523	
05-25-09	grant to help fund television ad production and website development for the iHeart Adoption outreach program	15,000.00
	Disbursed to LOS ANGELES REGIONAL FOOD BANK 1734 E. 41st Street Los Angeles, California 90058-1502	
05-25-09	grant to help distribute food for the hungry	5,000.00
	Disbursed to THE MIDNIGHT MISSION 601 S. San Pedro Los Angeles, California 90014	
05-25-09	grant in support of 2009 Meal Services for the Homeless program	10,000.00

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		AMOUNT
	Disbursed to FOOD SHARE, INC. 4156 Southbank Road Oxnard, California 93036	
05-25-09	grant in support of efforts to alleviate hunger in Ventura County	$ 20,000.00
	Disbursed to ECUMENICAL COUNCIL OF THE PASADENA AREA CHURCHES P.O. Box 41125 Pasadena, California 91114	
05-25-09	grant to help feed the homeless and needy in Pasadena	15,000.00
	Disbursed to UNION STATION HOMELESS SERVICES 825 E. Orange Grove Boulevard Pasadena, California 91104	
05-25-09	grant to help provide meals, shelter and vital services for the homeless	15,000.00
	Disbursed to SACRAMENTO FOOD BANK SERVICES 3333 Third Avenue Sacramento, California 95817	
05-25-09	grant for Mobile Food Program expansion	20,000.00
	Disbursed to PROJECT UNDERSTANDING AT SAN BUENAVENTURA P.O. Box 25460 Ventura, California 93002-2280	
05-25-09	grant for the Food Emergency Food Pantry expansion	10,000.00
	Disbursed to SACRAMENTO LOAVES & FISHES P.O. Box 2161 Sacramento, California 95812	
05-25-09	grant to help feed hungry & homeless in community	20,000.00

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		AMOUNT
	Disbursed to RESCUE MISSION ALLIANCE 12701 Van Nuys Boulevard Van Nuys, California 91409-8073	
05-25-09	grant for Valley Food Bank to help feed the hurting, hungry & struggling families (Stock the Box Campaign)	$ 5,000.00
	Disbursed to UNION RESCUE MISSION 545 S. San Pedro Los Angeles, California 90013	
05-25-09	grant to provide emergency services for the homeless on Skid Row in Los Angeles	5,000.00
	Disbursed to MEND 10641 San Fernando Road Pacoima, California 91331	
05-25-09	grant in support of the Food Bank	5,000.00
	Disbursed to LOS ANGELES MISSION 303 E. 5th Street Los Angeles, California 90013	
05-25-09	grant to help feed the homeless and needy	5,000.00
	Disbursed to THE WALLACE MEDICAL CONCERN P.O. Box 3506 Gresham, Oregon 97030	
05-25-09	grant for general operating expenses to provide no-cost access to health care to uninsured in Portland, Oregon	20,000.00
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (U.C. DAVIS) One Shields Avenue Davis, California 95616	
05-25-09	third and final installment for Tomales Bay Workshops	10,000.00

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		AMOUNT
	grant for American River College Editorial Fellowship	$ 1,500.00
	increase in tuition/lodging for three Borchard fellows	1,500.00
	Disbursed to THE SHADE TREE INCORPORATED P.O. Box 669 Las Vegas, Nevada 89125	
05-25-09	grant to help buy food for homeless women and children in the shelter	15,000.00
	Disbursed to TEMPORARY ASSISTANCE FOR DOMESTIC CRISIS, INC. (SAFE NEST) 2915 W. Charleston # 12 Las Vegas, Nevada 89102	
05-25-09	grant in support of Safe Nest Shelter Family Conflict Prevention project and Family Recreation Program	20,000.00
	Disbursed to NEVADA PARTNERSHIP FOR HOMELESS YOUTH P.O. Box 20135 Las Vegas, Nevada 89112	
05-25-09	grant for education and employment assistance services to help welfare of homeless youth in Las Vegas Valley	15,000.00
	Disbursed to MIRACLE FLIGHTS FOR KIDS 2764 N. Green Valley Parkway # 115 Green Valley, Nevada 89014-2120	
05-25-09	grant for purchase of commercial airline tickets for sick children	10,000.00
	Disbursed to THE NATURE CONSERVANCY 313 East Front Street Roanoke, Illinois 61561	
05-25-09	grant in support of projects of the Great Rivers Partnership	20,000.00

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		AMOUNT
	Disbursed to GLOBAL GREEN USA 2218 Main Street, 2nd Fl. Santa Monica, California 90405	
05-25-09	grant for Coalition for Resource Recovery's Program "Closing the Loop on Paper Cups & Fast Food Packaging"	$ 10,000.00
	Disbursed to THE LEUKEMIA & LYMPHOMA SOCIETY 9320 SW Barbier Boulevard, Suite 140 Portland, Oregon 97219	
05-25-09	grant to help provide support, outreach & education programs mainly to minority and elderly population	5,000.00
	Disbursed to U.S.C./EMERITI CENTER Los Angeles, California 90089-0191	
05-25-09	5th and final installment of $ 8,000 grant for Borchard Lecture Series 2009	1,600.00
	Disbursed to HEIFER PROJECT INTERNATIONAL, INC. 1 World Avenue Little Rock, Arkansas 72202	
05-25-09	3rd and final installment of the $ 150,000 grant for the Avenor Grasscutter and Beekeeping project in Ghana	25,000.00
	Disbursed to NEVADA BALLET THEATRE, INC. 1651 Inner Circle 1 Las Vegas, Nevada 89134	
05-25-09	2nd installment of $ 30,000 grant for Future Dance Scholars program	10,000.0

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		AMOUNT
	Disbursed to ABA FUND FOR JUSTICE & EDUCATION 740 15th St. N.W. Washington, D.C. 20005-1022	
05-25-09	3rd and final installment of $ 42,475 matching grant for "Accommodating Cognitive Impairments in Voting: Shaping Clinically and Ethically Sound Institutional and Public Policy"	$ 17,475.00
	Disbursed to NATIONAL SENIOR CITIZENS LAW CENTER 1444 Eye St. N.W. 1100 Washington, D.C. 20005	
06-04-09	grant for D.C. office summer internship	5,000.00
	Disbursed to ABA JUSTICE & EDUCATION FUND 740 15th St. N.W. Washington, D.C. 20005	
06-04-09	grant for Commission on Law and Aging summer internship	5,000.00
	Disbursed to NORTHERN CALIFORNIA LEGAL SERVICES 444 North Third Street, Suite 312 Sacramento, California 95811	
06-05-09	Senior Legal Hotline – grant for summer internship	5,000.00
	Disbursed to UTAH LEGAL SERVICES 205 North 400 West Salt Lake City, Utah 84103	
06-05-09	grant for summer internship	5,000.00
	Disbursed to UTAH LEGAL SERVICES 205 North 400 West Salt Lake City, Utah 84103	
06-15-09	fellowship for M.J. Ciccarello 07-01-09 to 06-30-10	12,918.00

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		AMOUNT
	Disbursed to SENIOR LAW CENTER, INC. 100 South Broad Street # 1810 Philadelphia, Pa. 19110	
06-30-09	fellowship for Roxane Crowley 09-01-09 to 08-31-10	40,000.00
	Disbursed to MAIN STREET LEGAL SERVICES, INC. 65-21 Main Street Flushing, N.Y. 11367	
06-30-09	fellowship for Yan Lian Kuang 09-01-09 to 08-31-10	40,000.00
	TOTAL GRANTS:	$ 1,262,693.00