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Form **990**Department of the Treasury
Internal Revenue Service

CHANGE OF ACCOUNTING PERIOD
Return of Organization Exempt From Income Tax
 Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung
 benefit trust or private foundation)

OMB No. 1545-0047

2008Open to Public
Inspection

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

A For the 2008 calendar year, or tax year beginning JUL 1, 2009 and ending OCT 31, 2009

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Termination ☐ Amended return ☐ Application pending	Please use IRS label or print or type See Specific Instructions	C Name of organization CALIFORNIA MASONIC FOUNDATION Doing Business As Number and street (or P.O. box if mail is not delivered to street address) Room/suite 1111 CALIFORNIA STREET City or town, state or country, and ZIP + 4 SAN FRANCISCO, CA 94108 F Name and address of principal officer JOHN FREDERICK LOWE SAME AS C ABOVE	D Employer identification number 23-7013074 E Telephone number 415-776-7000 G Gross receipts \$ 2,422,829. H(a) Is this a group return for affiliates? ☐ Yes ☒ No H(b) Are all affiliates included? ☐ Yes ☐ No If "No," attach a list (see instructions) H(c) Group exemption number ▶
I Tax-exempt status ☒ 501(c) (3) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527		J Website: ▶ WWW.FREEMASON.ORG	
K Type of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶		L Year of formation: 1969 M State of legal domicile: CA	

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities APPLICATION OF MASONIC PRINCIPLES IN SUPPORT OF EDUCATION, LEADERSHIP, AND COMMUNITIES. 2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its assets 3 Number of voting members of the governing body (Part VI, line 1a) 3 9 4 Number of independent voting members of the governing body (Part VI, line 1b) 4 9 5 Total number of employees (Part V, line 2a) 5 0 6 Total number of volunteers (estimate if necessary) 6 9 7a Total gross unrelated business revenue from Part VIII, line 12, column (C) 7a 0. b Net unrelated business taxable income from Form 990-T, line 34 7b 0.													
Revenue	8 Contributions and grants (Part VIII, line 1h) 9 Program service revenue (Part VIII, line 2g) 10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) 12 Total revenue. Add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Prior Year</th> <th style="text-align: center;">Current Year</th> </tr> </thead> <tbody> <tr> <td align="right">346,164.</td> <td align="right">628,608.</td> </tr> <tr> <td align="right"><2,244,443.></td> <td align="right">156,361.</td> </tr> <tr> <td align="right">8,815.</td> <td></td> </tr> <tr> <td align="right"><1,889,464.></td> <td align="right">784,969.</td> </tr> <tr> <td align="right">1,408,871.</td> <td align="right">271,245.</td> </tr> </tbody> </table>	Prior Year	Current Year	346,164.	628,608.	<2,244,443.>	156,361.	8,815.		<1,889,464.>	784,969.	1,408,871.	271,245.
Prior Year	Current Year													
346,164.	628,608.													
<2,244,443.>	156,361.													
8,815.														
<1,889,464.>	784,969.													
1,408,871.	271,245.													
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) 14 Benefits paid to or for members (Part IX, column (A), line 4) 15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 16a Professional fundraising fees (Part IX, column (A), line 11e) b Total fundraising expenses (Part IX, column (D), line 25) ▶ 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f) 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) 19 Revenue less expenses. Subtract line 18 from line 12	<table border="1" style="width:100%; border-collapse: collapse;"> <tbody> <tr> <td align="right">748,883.</td> <td align="right">268,495.</td> </tr> <tr> <td align="right">2,157,754.</td> <td align="right">539,740.</td> </tr> <tr> <td align="right"><4,047,218.></td> <td align="right">245,229.</td> </tr> </tbody> </table>	748,883.	268,495.	2,157,754.	539,740.	<4,047,218.>	245,229.						
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Net Assets or Fund Balances	20 Total assets (Part X, line 16) 21 Total liabilities (Part X, line 26) 22 Net assets or fund balances. Subtract line 21 from line 20	<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Beginning of Year</th> <th style="text-align: center;">End of Year</th> </tr> </thead> <tbody> <tr> <td align="right">18,620,572.</td> <td align="right">19,567,028.</td> </tr> <tr> <td align="right">1,171,643.</td> <td align="right">111,537.</td> </tr> <tr> <td align="right">17,448,929.</td> <td align="right">19,455,491.</td> </tr> </tbody> </table>	Beginning of Year	End of Year	18,620,572.	19,567,028.	1,171,643.	111,537.	17,448,929.	19,455,491.				
Beginning of Year	End of Year													
18,620,572.	19,567,028.													
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17,448,929.	19,455,491.													

Part II Signature Block

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 officer) is based on all information of which preparer has any knowledge.			
Sign Here	Signature of officer <i>Thomas J. Boyer</i> THOMAS BOYER, CFO Type or print name and title	Date <i>3/12/10</i>	
Paid Preparer's Use Only	Preparer's signature <i>Quay S. Papia</i> Firm's name (or yours if self-employed), address, and ZIP + 4 MOSS ADAMS LLP 3121 WEST MARCH LANE, SUITE 100 STOCKTON, CA 95219	Date <i>3/10/2010</i> Check if self-employed ☐ Preparer's identifying number (see instructions) EIN ▶ Phone no. ▶ 209-955-6100	

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

SCANNED APR 05 2010

 RECEIVED
 MAR 16 2010
 STOCKTON, CA
 GORDEN UT

1918

Part III Statement of Program Service Accomplishments (see instructions)

1 Briefly describe the organization's mission:

THE CALIFORNIA MASONIC FOUNDATION'S MISSION IS TO APPLY MASONIC PRINCIPLES IN SUPPORT OF EDUCATION, LEADERSHIP, AND COMMUNITIES THROUGH SEVERAL IMPORTANT PROGRAMS THAT TOUCH THE LIVES OF THOUSANDS EACH YEAR.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes ☒ No

If "Yes", describe these new services on Schedule O

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐ Yes ☒ No

If "Yes", describe these changes on Schedule O

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code) (Expenses \$ 83,351. including grants of \$ 80,000.) (Revenue \$)

UNIVERSITY PARTNERSHIP PROGRAM - THIS PROGRAM FUNDS A SCHOLARLY PARTNERSHIP BETWEEN THE MASONIC FOUNDATION AND THE UNIVERSITY OF CALIFORNIA LOS ANGELES TO ADVANCE THE STUDY AND UNDERSTANDING OF FREEMASONRY.

4b (Code) (Expenses \$ 74,460. including grants of \$ 73,118.) (Revenue \$)

MASONIC EDUCATION AND LEADERSHIP TRAINING (MELT) DEVELOPS FUTURE MASONIC LEADERS AND ENRICHES MASONIC EDUCATION THROUGH SPONSORSHIP OF THE WARDENS LEADERSHIP RETREATS, LODGE MANAGEMENT CERTIFICATION PROGRAM AND ENHANCED EDUCATION OPPORTUNITIES. THE FOUNDATION UNDERWRITES A GREAT PORTION OF THE PROGRAM EXPENSES EACH YEAR.

4c (Code) (Expenses \$ 29,196. including grants of \$ 20,500.) (Revenue \$)

ANNUAL COLLEGE SCHOLARSHIP HELPS MAKE THE DREAM OF COLLEGE A REALITY FOR HUNDREDS OF TOMORROW'S LEADERS. SINCE 1970 MORE THAN 2,000 STUDENTS HAVE BEEN ASSISTED WITH SCHOLARSHIP AWARDS RANGING FROM \$10,000 TO \$40,000 PER STUDENT OVER FOUR YEARS.

4d Other program services (Describe in Schedule O)

(Expenses \$ 143,851. including grants of \$ 97,627.) (Revenue \$)

4e Total program service expenses ► \$ 330,858. (Must equal Part IX, Line 25, column (B))

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	1 X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?	2 X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>	3	X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities? <i>If "Yes," complete Schedule C, Part II</i>	4	X
5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? <i>If "Yes," complete Schedule C, Part III</i>	5	
6 Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	6	X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>	7	X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	8	X
9 Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>	9	X
10 Did the organization hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	10 X	
11 Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? <i>If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable</i>	11 X	
12 Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII</i>	12	X
13 Is the organization a school as described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	13	X
14a Did the organization maintain an office, employees, or agents outside of the U.S.?	14a	X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U.S.? <i>If "Yes," complete Schedule F, Part I</i>	14b	X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Part II</i>	15	X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Part III</i>	16	X
17 Did the organization report more than \$15,000 on Part IX, column (A), line 11e? <i>If "Yes," complete Schedule G, Part I</i>	17	X
18 Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	18	X
19 Did the organization report more than \$15,000 on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>	19	X
20 Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H</i>	20	X
21 Did the organization report more than \$5,000 on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	21 X	
22 Did the organization report more than \$5,000 on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	22	X
23 Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? <i>If "Yes," complete Schedule J</i>	23 X	
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer questions 24b-24d and complete Schedule K</i> <i>If "No," go to question 25</i>	24a	X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c	
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a	X
b Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? <i>If "Yes," complete Schedule L, Part I</i>	25b	X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>	26	X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>	27	X

Part IV Checklist of Required Schedules (continued)

	Yes	No
28 During the tax year, did any person who is a current or former officer, director, trustee, or key employee		
a Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? <i>If "Yes," complete Schedule L, Part IV</i>		X
b Have a family member who had a direct or indirect business relationship with the organization? <i>If "Yes," complete Schedule L, Part IV</i>		X
c Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? <i>If "Yes," complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>	X	
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	X	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	X	
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		X

Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U S Information Returns. Enter -0- if not applicable.	10	
1b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	0	
1c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.	0	
2b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return (see instructions).		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
3b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O.		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
4b	If "Yes," enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5c	If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
6a	Did the organization solicit any contributions that were not tax deductible?		X
6b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
7a	Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?		X
7b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
7c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7d	If "Yes," indicate the number of Forms 8282 filed during the year.		
7e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
7h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
8	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
9	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.		
9a	Did the organization make any taxable distributions under section 4966?		
9b	Did the organization make a distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter N/A		
10a	Initiation fees and capital contributions included on Part VIII, line 12.		
10b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.		
11	Section 501(c)(12) organizations. Enter N/A		
11a	Gross income from members or shareholders.		
11b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
12b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year: N/A		

Part VI Governance, Management, and Disclosure (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)**Section A. Governing Body and Management**

	Yes	No
<i>For each "Yes" response to lines 2-7b below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.</i>		
1a Enter the number of voting members of the governing body	1a	9
b Enter the number of voting members that are independent	1b	9
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3	X
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?	4	X
5 Did the organization become aware during the year of a material diversion of the organization's assets?	5	X
6 Does the organization have members or stockholders?	6	X
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a	X
b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b	X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	8a	X
b Each committee with authority to act on behalf of the governing body?	8b	X
9a Does the organization have local chapters, branches, or affiliates?	9a	X
b If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	9b	
10 Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990	10	X
11 Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	11	X

Section B. Policies

	Yes	No
12a Does the organization have a written conflict of interest policy? If "No," go to line 13	12a	X
b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
c Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	12c	X
13 Does the organization have a written whistleblower policy?	13	X
14 Does the organization have a written document retention and destruction policy?	14	X
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision:		
a The organization's CEO, Executive Director, or top management official?	15a	X
b Other officers or key employees of the organization?	15b	X
Describe the process in Schedule O (see instructions)		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
b If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ► **CA**

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
☐ Own website ☒ Another's website ☒ Upon request

19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization ►
TOM BOYER - 415-292-9133
1111 CALIFORNIA STREET, SAN FRANCISCO, CA 94108

Part VIII Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants and other similar amounts	1 a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e					
	f All other contributions, gifts, grants, and similar amounts not included above						
	1f 628,608.						
	g Noncash contributions included in lines 1a-1f \$						
h Total. Add lines 1a-1f			628,608.				
Program Service Revenue			Business Code				
	2 a						
	b						
	c						
	d						
	e						
	f All other program service revenue						
g Total. Add lines 2a-2f							
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			150,836.			150,836.
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6 a Gross Rents	(i) Real	(ii) Personal				
	b Less rental expenses						
	c Rental income or (loss)						
	d Net rental income or (loss)						
	7 a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
	b Less cost or other basis and sales expenses						
	c Gain or (loss)						
	d Net gain or (loss)			5,525.			5,525.
	8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18	a					
	b Less direct expenses	b					
	c Net income or (loss) from fundraising events						
	9 a Gross income from gaming activities See Part IV, line 19	a					
	b Less direct expenses	b					
	c Net income or (loss) from gaming activities						
	10 a Gross sales of inventory, less returns and allowances	a					
	b Less cost of goods sold	b					
	c Net income or (loss) from sales of inventory						
Miscellaneous Revenue			Business Code				
11 a							
b							
c							
d All other revenue							
e Total. Add lines 11a-11d							
12 Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e				784,969.	0.	0.	156,361.

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21	270,745.	270,745.		
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22	500.	500.		
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees				
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages				
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes				
11 Fees for services (non-employees)				
a Management				
b Legal	110.		110.	
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	23,121.		23,121.	
g Other	29,844.		29,844.	
12 Advertising and promotion				
13 Office expenses	32,921.	82.	32,839.	
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel	5,973.	1,543.	4,430.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	384.		384.	
23 Insurance				
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a SHARED SERVICE ALLOC.	168,163.	55,906.	112,257.	
b MISCELLANEOUS	7,420.	1,722.	5,698.	
c SYMPOSIUM	360.	360.		
d PROPERTY TAXES	199.		199.	
e				
f All other expenses				
25 Total functional expenses Add lines 1 through 24f	539,740.	330,858.	208,882.	0.
26 Joint Costs. Check here ☐ if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X Balance Sheet

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	209,412.	1	123,712.
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net	41,420.	3	2,566.
	4 Accounts receivable, net		4	
	5 Receivables from current and former officers, directors, trustees, key employees, or other related parties Complete Part II of Schedule L		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) Complete Part II of Schedule L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges		9	
	10a Land, buildings, and equipment cost basis	10a 25,034.		
	b Less accumulated depreciation Complete Part VI of Schedule D	10b 22,560.		
		2,858.	10c	2,474.
	11 Investments - publicly traded securities	18,344,544.	11	19,355,309.
	12 Investments - other securities See Part IV, line 11		12	
	13 Investments - program-related See Part IV, line 11		13	
	14 Intangible assets		14	
15 Other assets. See Part IV, line 11	22,338.	15	82,967.	
16 Total assets. Add lines 1 through 15 (must equal line 34)	18,620,572.	16	19,567,028.	
Liabilities	17 Accounts payable and accrued expenses	203,095.	17	31,974.
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow account liability Complete Part IV of Schedule D		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable		24	
	25 Other liabilities Complete Part X of Schedule D	968,548.	25	79,563.
	26 Total liabilities. Add lines 17 through 25	1,171,643.	26	111,537.
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here ☒ and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets	3,604,299.	27	3,584,188.
	28 Temporarily restricted net assets	301,233.	28	2,327,905.
	29 Permanently restricted net assets	13,543,397.	29	13,543,398.
	Organizations that do not follow SFAS 117, check here ☐ and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances	17,448,929.	33	19,455,491.
	34 Total liabilities and net assets/fund balances	18,620,572.	34	19,567,028.

Part XI Financial Statements and Reporting

		Yes	No
1	Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a	X
b	Were the organization's financial statements audited by an independent accountant?	2b	X
c	If "Yes" to lines 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a	X
b	If "Yes," did the organization undergo the required audit or audits?	3b	

Department of the Treasury
Internal Revenue Service

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization

CALIFORNIA MASONIC FOUNDATION

Employer identification number

23-7013074

Part I	Reason for Public Charity Status (All organizations must complete this part) (see instructions)
---------------	---

The organization is not a private foundation because it is (Please check only **one** organization)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).** (Attach Schedule H)

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state _____

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II)

9 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete the Part III)

10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).** (see instructions)

11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h

a ☐ Type I b ☐ Type II c ☐ Type III - Functionally integrated d ☐ Type III - Other

e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)

f ☐ If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box _____

g ☐ Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?

(ii) A family member of a person described in (i) above?

(iii) A 35% controlled entity of a person described in (i) or (ii) above?

h ☐ Provide the following information about the organizations the organization supports

[illegible]

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	1036542.	1491438.	4090113.	346,164.	628,608.	7592865.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 - 3	1036542.	1491438.	4090113.	346,164.	628,608.	7592865.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						4216585.
6 Public Support. Subtract line 5 from line 4						3376280.

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4	1036542.	1491438.	4090113.	346,164.	628,608.	7592865.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	466,084.	601,611.	681,888.	792,322.	150,807.	2692712.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)	17,466.	8,922.	2,908.	8,640.		37,936.
11 Total support. Add lines 7 through 10						10323513.
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ► ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	32.70	%
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	28.29	%
16a 33 1/3% support test - 2008. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ► ☐			
b 33 1/3% support test - 2007. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ► ☐			
17a 10% -facts-and-circumstances test - 2008. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ► ☒			
b 10% -facts-and-circumstances test - 2007. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ► ☐			
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ► ☐			

Part III Support Schedule for Organizations Described in Section 509(a)(2) (Complete only if you checked the box on line 9 of Part I.)**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 - 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2007 Schedule A, Part IV-A, line 27h	18	%

19a 33 1/3% support tests - 2008. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

b 33 1/3% support tests - 2007. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

Part IV **Supplemental Information.** Complete this part to provide the explanation required by Part II, line 10, Part II, line 17a or 17b, or Part III, line 12. Provide any other additional information (see instructions)

SCHEDULE A, PART II, LINE 10, EXPLANATION FOR OTHER INCOME:

SYMPOSIUM REVENUE

UNDER IRC REG. SECTION 1.170A-9(F)(3), IF AN ORGANIZATION FAILS TO MEET THE 33 1/3 PERCENT-OF-SUPPORT TEST UNDER SUBPARAGRAPH (2), IT CAN STILL QUALIFY AS A PUBLICLY SUPPORTED ORGANIZATION UNDER IRC SECTION 170(B)(1)(A)(VI) IF IT MEETS THE "FACTS AND CIRCUMSTANCES" TEST UNDER SUBPARAGRAPH (3).

REQUIREMENT 1: SUBSTANTIAL PUBLIC SUPPORT:

THE ORGANIZATION DERIVES LESS THAN 33 1/3% FROM DIRECT CONTRIBUTION FROM THE GENERAL PUBLIC, BUT MORE THAN 10%.

REQUIREMENT 2: ATTRACTION OF PUBLIC SUPPORT:

THE CALIFORNIA MASONIC FOUNDATION HAS AN ANNUAL FUND CAMPAIGN WHERE IT SOLICITS 60,000 PLUS POTENTIAL DONORS EACH YEAR. PARTICIPATION IS IN THE 10-13% RANGE. TOTAL GIVING EACH YEAR RANGES BETWEEN \$600,000 AND \$800,000, DEPENDING ON THE NATURE OF THE PROGRAM. THE ORGANIZATION ALSO SOLICIT AND RECEIVE PLANNED GIFTS, SUCH AS CHARITABLE TRUSTS, AND CHARITABLE GIFT ANNUITIES.

THIS IS A FULLTIME AND CONTINUOUS PART OF OUR FUNDRAISING STRATEGY. THE ORGANIZATION DOES NOT TYPICALLY SEEK FUNDS FROM GOVERNMENT UNITS OR OTHER PUBLIC CHARITIES

ADDITIONAL FACTS:

PERCENTAGE OF SUPPORT DERIVED BY THE ORGANIZATION FROM THE PUBLIC OR FROM GOVERNMENTAL UNITS: 02.70%

Part IV **Supplemental Information.** Complete this part to provide the explanation required by Part II, line 10, Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. (see instructions)

THE ORGANIZATION'S SUPPORT IS SOURCED FROM THE GENERAL PUBLIC AND FEW LARGE DONORS.

CALIFORNIA MASONIC FOUNDATION SOLICITS DONATION THROUGH DIRECT MAIL, MASONIC FOUNDATION WEBSITE AND FACE-TO-FACE COMMUNICATION WITH PROSPECTIVE DONORS.

OVER THE PAST SEVERAL YEARS, THE CALIFORNIA MASONIC FOUNDATION HAS SOLICITED AND RAISED FUNDS FROM MORE THAN 10,000 DIFFERENT DONORS. THE AVERAGE GIFT IS APPROXIMATELY \$150. THIS BROAD LEVEL OF GIVING CONTRASTS THE MAJOR GIFT PORTION OF THE PROGRAM, WHERE A SMALL GROUP OF DONORS HAS MADE GIFTS OR PLEDGES IN THE \$25,000 TO \$100,000 RANGE.

THE ORGANIZATION HAS A GOVERNING BODY THAT IS DIVERSE AND IS MADE UP OF INDIVIDUALS ELECTED PURSUANT TO THE ORGANIZATION'S GOVERNING BYLAWS BY A BROAD MEMBERSHIP BASE. PLEASE SEE FORM 990, PART VII FOR A FULL LIST OF BOARD MEMBERS.

IN CARRYING OUT ITS EXEMPT PURPOSES, THE ORGANIZATION PROVIDES THE FOLLOWING SERVICES AND/OR FUNCTIONS:

SINCE 1994, THE FOUNDATION HAS INVESTED MORE THAN \$3.7 MILLION IN A TEACHER TRAINING PROGRAM CALL THE MASONIC STUDENT ASSISTANCE PROGRAM (MSAP). THE VERY SPECIFIC CORE TEAM TRAINING WAS RECEIVED BY MORE THAN 5,000 TEACHERS IN CALIFORNIA, WHO HAVE, TO DATE, REFERRED MORE THAN 55,000 CHILDREN FOR FURTHER CARE AND ATTENTION.

THE FOUNDATION ALSO RUNS A BROAD-BASED SCHOLARSHIP PROGRAM, WHICH PROVIDES COLLEGE SCHOLARSHIPS TO MORE THAN 250 STUDENTS EACH YEAR. THE DOLLARS

Part IV **Supplemental Information.** Complete this part to provide the explanation required by Part II, line 10, Part II, line 17a or 17b, or Part III, line 12. Provide any other additional information (see instructions)

COMMITTED TOTALED MORE THAN \$900,000. THE APPLICATION IS WEIGHED MOST HEAVILY ON ACADEMIC PERFORMANCE AND FINANCIAL NEED. THE PROCESS ATTRACTED MORE THAN 1,200 COMPLETED APPLICATIONS THIS PAST YEAR.

THE FOUNDATION HAS PROVIDED SUPPORT FOR PUBLIC EDUCATION THROUGH DEVELOPING PARTNERSHIP WITH DISTRICTS, SCHOOLS AND PROMOTING LODGE LEVEL SUPPORT IN LOCAL COMMUNITIES ALL OVER CALIFORNIA. IT HAS PROVIDED MORE THAN \$50,000 IN DIRECT SUPPORT OF SCHOOL BASED PROGRAMS IN THE LAST THREE YEARS.

THE FOUNDATION SUPPORTS A CHILD ID PROGRAM, WHERE MEMBERS SET UP BOOTHS AT PUBLIC GATHERINGS TO CREATE IDENTIFICATION CARDS FOR YOUNG CHILDREN, INCLUDING PHOTOS AND FINGER PRINTS.

THE FOUNDATION IS AVAILABLE TO MANAGE SCHOLARSHIPS FOR OTHER ORGANIZATIONS AND CHARITIES, INCLUDING FUND MANAGEMENT, APPLICATION PROCESSING, AND CHECK DISTRIBUTION.

THE FOUNDATION PROVIDES OVERSIGHT AND ENCOURAGEMENT TO THE 350 LOCAL MASONIC LODGES TO ENGAGE THEIR COMMUNITIES IN COMMUNITY SERVICE, SCHOOL SUPPORT AND PUBLIC SERVICE.

Schedule D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

► Attach to Form 990. To be completed by organizations that
answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

OMB No. 1545-0047

2008
Open to Public
Inspection

Name of the organization

CALIFORNIA MASONIC FOUNDATION

Employer identification number

23-7013074

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the
organization answered "Yes" to Form 990, Part IV, line 6

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate contributions to (during year)		
3 Aggregate grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?		☐ Yes ☐ No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit?		☐ Yes ☐ No

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7

1 Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e.g., recreation or pleasure)	☐ Preservation of an historically important land area
☐ Protection of natural habitat	☐ Preservation of certified historic structure
☐ Preservation of open space	

2 Complete lines 2a-2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ►

4 Number of states where property subject to conservation easement is located ►

5 Does the organization have a written policy regarding the periodic monitoring, inspection, violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff or volunteer hours devoted to monitoring, inspecting, and enforcing easements during the year ►

7 Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ► \$

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" to Form 990, Part IV, line 8

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1	► \$	
(ii) Assets included in Form 990, Part X	► \$	

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:

a Revenues included in Form 990, Part VIII, line 1	► \$	
b Assets included in Form 990, Part X	► \$	

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

- a ☐ Public exhibition d ☐ Loan or exchange programs
 b ☐ Scholarly research e ☐ Other _____
 c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Trust, Escrow and Custodial Arrangements. Complete if organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV and complete the following table

	Amount
1c	
1d	
1e	
1f	

- c Beginning balance
 d Additions during the year
 e Distributions during the year
 f Ending balance

2a Did the organization include an amount on Form 990, Part X, line 21? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV

Part V Endowment Funds. Complete if organization answered "Yes" to Form 990, Part IV, line 10

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	13882677.				
b Contributions	559,259.				
c Investment earnings or losses	1,577,246.				
d Grants or scholarships	267,621.				
e Other expenditures for facilities and programs	15,375.				
f Administrative expenses	133,054.				
g End of year balance	15603132.				

2 Provide the estimated percentage of the year end balance held as

- a Board designated or quasi-endowment ► 7.00 %
 b Permanent endowment ► 86.00 %
 c Term endowment ► 7.00 %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

- (i) unrelated organizations
 (ii) related organizations

	Yes	No
3a(i)	X	
3a(ii)	X	
3b	X	

b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIV the intended uses of the organization's endowment funds

Part VI Investments - Land, Buildings, and Equipment. See Form 990, Part X, line 10

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment		7,015.	5,307.	1,708.
e Other		18,019.	17,253.	766.
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c))				2,474.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
Financial derivatives and other financial products		
Closely-held equity interests		
Other _____		
Total. (Col (b) should equal Form 990, Part X, col (B) line 12.) ►		

[illegible][illegible]

(a) Description of liability	(b) Amount
Federal income taxes	
DUE TO OTHER MASONIC ENTITIES	70,914.
DUE TO GRAND LODGE	8,649.
Total. (Column (b) should equal Form 990, Part X, col (B) line 25.)	79,563.

On Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48.

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	
4	Net unrealized gains (losses) on investments	4	
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	
9	Total adjustments (net). Add lines 4-8	9	
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12.)	5	

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Losses reported on Form 990, Part IX, line 25	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	
4	Amounts included on Form 990, Part IX, line 25, but not on line 1		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18.)	5	

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b

PART V, LINE 4: PRIMARILY COLLEGE SCHOLARSHIPS AND OTHER EDUCATIONAL

ACTIVITIES. IN ADDITION, PORTIONS ARE USED FOR THE MASONIC LEADERSHIP

TRAINING AND THE ONGOING MAINTENANCE OF CALIFORNIA MASONIC MEMORIAL

TEMPLE.

PART X: IN JULY 2006, THE FASB ISSUED ASC 740 "INCOME TAXES"

(FORMERLY FASB INTERPRETATION NO. 48, ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES ("FIN 48")). ASC 740 CLARIFIES THE ACCOUNTING FOR INCOME TAXES BY

Part XIV Supplemental Information (continued)

PRESCRIBING A MINIMUM PROBABILITY THRESHOLD THAT A TAX POSITION MUST MEET BEFORE A FINANCIAL STATEMENT BENEFIT IS RECOGNIZED. THE MINIMUM THRESHOLD IS DEFINED IN ASC 740 AS A TAX POSITION THAT IS MORE LIKELY THAN NOT TO BE SUSTAINED UPON EXAMINATION BY THE APPLICABLE TAXING AUTHORITY, INCLUDING RESOLUTION OF ANY RELATED APPEALS OR LITIGATION PROCESSES, BASED ON THE TECHNICAL MERITS OF THE POSITION. THE TAX BENEFIT TO BE RECOGNIZED IS MEASURED AS THE LARGEST AMOUNT OF BENEFIT THAT IS GREATER THAN FIFTY PERCENT LIKELY OF BEING REALIZED UPON ULTIMATE SETTLEMENT.

ASC 740 WAS ORIGINALLY EFFECTIVE FOR FISCAL YEARS BEGINNING AFTER DECEMBER 15, 2006. IN FEBRUARY 2008, THE FASB ISSUED STAFF POSITION ("FSP") FIN 48-2, "EFFECTIVE DATE OF FASB INTERPRETATION NO. 48 FOR CERTAIN NONPUBLIC ENTERPRISES," WHICH DELAYED BY ONE YEAR THE EFFECTIVE DATE OF ASC 740 FOR CERTAIN NONPUBLIC ENTERPRISES. IN DECEMBER 2008, THE FASB ISSUED FSP FIN 48-3, "EFFECTIVE DATE OF FASB INTERPRETATION NO. 48 FOR CERTAIN NONPUBLIC ENTERPRISES," WHICH AGAIN DELAYED BY ONE YEAR THE EFFECTIVE DATE OF ASC 740 FOR CERTAIN NONPUBLIC ENTERPRISES.

THE FOUNDATION HAS ELECTED TO DEFER THE APPLICATION OF ASC 740 TO YEARS BEGINNING AFTER DECEMBER 15, 2008, IN ACCORDANCE WITH FSP FIN 48-3. THE FOUNDATION IS CONTINUING TO EVALUATE THE IMPACT ASC 740 WILL HAVE ON ITS FINANCIAL STATEMENTS.

SCHEDULE I
(Form 990)

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the U.S.**

OMB No. 1545-0047

2008

► **Complete if the organization answered "Yes," on Form 990, Part IV, lines 21 or 22.**
► **Attach to Form 990.**

**Open to Public
Inspection**

Name of the organization

CALIFORNIA MASONIC FOUNDATION

Employer identification number
23-7013074

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ **Yes** ☐ **No**

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II **Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed. ►

1 (a) Name and address of organization or government

(b) EIN

(c) IRC section if applicable

(d) Amount of cash grant

(e) Amount of non-cash assistance

(f) Method of valuation (book, FMV, appraisal, other)

(g) Description of non-cash assistance

(h) Purpose of grant or assistance

SOUTHERN CALIFORNIA DEMOLAY ASSOCIATION - 303 W. LINCOLN AVENUE SUITE 200 - ANAHEIM, CA 92805
THE CAMPANILE FOUNDATION - SAN DIEGO STATE UNIVERSITY - 5500 CAMPANILE DR. - SAN DIEGO, CA 92182-4124

95-2645801

501(C)(3)

10,000.

0.

LEADERSHIP DEVELOPMENT

CALIFORNIA MASONIC MEMORIAL TEMPLE 1111 CALIFORNIA STREET SAN FRANCISCO, CA 94108
GRAND LODGE OF FREE AND ACCEPTED MASONS OF CALIFORNIA - 1111 CALIFORNIA ST - SAN FRANCISCO, CA 94108

94-1266937

501(C)(3)

91,880.

0.

LEADERSHIP DEVELOPMENT

THE U.C.L.A. FOUNDATION 10920 WILSHIRE BLVD. LOS ANGELES, CA 90024

94-0487790

501(C)(10)

63,118.

0.

GENERAL SUPPORT

2 Enter total number of section 501(c)(3) and government organizations

► **4**

3 Enter total number of other organizations

► **1**

LHA. For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

SEE PART IV FOR COLUMN (H) DESCRIPTIONS

Schedule I (Form 990) 2008

Part III Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Use Schedule I-1 (Form 990) if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance

Part IV Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.

SCHEDULE I, PART I, LINE 2: GRANT FUNDS ARE MONITORED BY THE APPROPRIATE COMMITTEES OF THE ORGANIZATION. THE APPROPRIATE COMMITTEES SET GUIDELINES ON HOW FUNDS ARE USED.

A) MASONIC FOUNDATION SCHOLARSHIP PROGRAM - THIS PROGRAM PROVIDES COLLEGE SCHOLARSHIPS TO MORE THAN 250 STUDENTS EACH YEAR. THE APPLICATION IS WEIGHED MOST HEAVILY ON ACADEMIC PERFORMANCE AND FINANCIAL NEEDS PRIOR TO GRANTING OF SCHOLARSHIP TO THE SCHOLAR STUDENTS. DURING THE SCHOLARSHIP PERIOD, THERE IS A VERIFICATION PROCESS OF THEIR GRADE POINT AVERAGE. THE

Part IV Supplemental Information

SCHOLAR STUDENTS SUBMIT A TRANSCRIPT OF RECORDS THAT SHOWS THEIR SCHOOL ACADEMIC PERFORMANCE. THE SCHOLAR STUDENTS ALSO NEED TO COMPLETE AN APPLICATION FORM OR A RENEWAL FORM, ATTACHING SUPPORTING DOCUMENTATION (E.G., TRANSCRIPT OF RECORD). ONCE DOCUMENTATION IS COMPLETE, THE MASONIC FOUNDATION STAFF IN CHARGE OF THE SCHOLARSHIP PROGRAM WILL UPDATE THE SCHOLARSHIP DATABASE TO INCLUDE THEM IN THE SCHOLARSHIP REPORT FOR SCHOLARSHIP COMMITTEE APPROVAL.

B) MASONIC EDUCATION LEADERSHIP PROGRAM - THE GRANT IS BASED ON ACTUAL EXPENSES MONITORED MONTHLY BY THE GRAND LODGE EXECUTIVE COMMITTEE. THE GRAND LODGE EXECUTIVE COMMITTEE DETERMINES AND APPROVES THE LEADERSHIP TRAININGS FOR THE PROGRAM AND APPROVES THE NECESSARY BUDGET.

C) GRANT TO MASONIC TEMPLE FOR BUILDING RENOVATION, REPAIRS AND MAINTENANCE - THE GRANT IS BASED ON ACTUAL EXPENSES MONITORED AND REVIEWED MONTHLY BY THE GRAND LODGE AND MASONIC FOUNDATION AND TEMPLE EXECUTIVE COMMITTEE.

PART II, LINE 1, COLUMN (H):

NAME OF ORGANIZATION OR GOVERNMENT:

GRAND LODGE OF FREE AND ACCEPTED MASONS OF CALIFORNIA

(H) PURPOSE OF GRANT OR ASSISTANCE: ENRICHMENT OF EDUCATION AND LEADERSHIP SKILLS AMONG MASTER MASONS THROUGH WORKSHOPS AND FOCUS GROUPS

**SCHEDULE J
(Form 990)**Department of the Treasury
Internal Revenue Service**Compensation Information****For certain Officers, Directors, Trustees, Key Employees, and Highest
Compensated Employees****► Attach to Form 990. To be completed by organizations that
answered "Yes" to Form 990, Part IV, line 23.**

OMB No 1545-0047

2008**Open to Public
Inspection****Name of the organization****CALIFORNIA MASONIC FOUNDATION****Employer identification number****23-7013074****Part I Questions Regarding Compensation****1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- | | |
|--|--|
| ☐ First-class or charter travel | ☐ Housing allowance or residence for personal use |
| ☐ Travel for companions | ☐ Payments for business use of personal residence |
| ☐ Tax indemnification and gross-up payments | ☐ Health or social club dues or initiation fees |
| ☐ Discretionary spending account | ☐ Personal services (e.g., maid, chauffeur, chef) |

b If line 1a is checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain.**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?**3** Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director. Check all that apply.

- | | |
|---|---|
| ☐ Compensation committee | ☒ Written employment contract |
| ☒ Independent compensation consultant | ☒ Compensation survey or study |
| ☐ Form 990 of other organizations | ☒ Approval by the board or compensation committee |

4 During the year, did any person listed in Form 990, Part VII, Section A, line 1a:

- a** Receive a severance payment or change of control payment?
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?
- c** Participate in, or receive payment from, an equity-based compensation arrangement?

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only 501(c)(3) and 501(c)(4) organizations must complete lines 5-8.**5** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization?
- b** Any related organization?

If "Yes," to line 5a or 5b, describe in Part III.

6 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization?
- b** Any related organization?

If "Yes" to line 6a or 6b, describe in Part III.

7 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III.**8** Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs. section 53.4958-4(a)(3)? If "Yes," describe in Part III.**Yes No****1b****2****4a****4b****4c****5a****5b****6a****6b****7****8****X****X****X****X****X****X****X****X****X**

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2008

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

2008

Open to Public
Inspection

Name of the organization

CALIFORNIA MASONIC FOUNDATION

Employer identification number

23-7013074

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

OTHER PROGRAM SERVICES INCLUDE:

1. CHILD ID PROGRAM, WHERE MEMBERS SET UP BOOTHS AT PUBLIC GATHERINGS TO CREATE IDENTIFICATION CARDS FOR YOUNG CHILDREN, INCLUDING PHOTOS AND FINGER PRINTS

2. MANAGEMENT OF SCHOLARSHIPS FOR OTHER ORGANIZATIONS AND CHARITIES, INCLUDING FUND MANAGEMENT, APPLICATION PROCESSING AND CHECK DISTRIBUTION

3. OVERSIGHT AND ENCOURAGEMENT TO THE 350 LOCAL MASONIC LODGES TO ENGAGE THEIR COMMUNITIES IN COMMUNITY SERVICE, SCHOOL SUPPORT AND PUBLIC SERVICE

4. THE MASONIC STUDENT ASSISTANCE PROGRAM: TEACHERS' TRAINING PROGRAM (MSAP) HELPS AT-RISK STUDENTS POSITIVELY REDIRECT THEIR LIVES BY PREPARING EDUCATORS TO EFFECTIVELY DEAL WITH THEIR NEEDS OVER THE PAST SEVERAL YEARS. FOUNDATION HAS INVESTED MORE THAN \$3 MILLION TO PROVIDE MSAP WORKSHOPS FOR HUNDREDS OF EDUCATORS EACH YEAR, POSITIVELY AFFECTING THOUSANDS OF CALIFORNIA CHILDREN EACH YEAR.

EXPENSES \$ 143851. INCLUDING GRANTS OF \$ 97627. REVENUE \$ 0.

FORM 990, PART VI, SECTION A, LINE 10: THE SENIOR ACCOUNTANT PREPARES THE FORM 990 SUPPORTING SCHEDULES/DATA, THEN THE CONTROLLER REVIEWS THE SCHEDULES/DATA AND SUBMITS TO CFO FOR FINAL APPROVAL. ONCE APPROVED, THE SCHEDULES ARE SUBMITTED TO THE TAX CONSULTANT FOR THE PREPARATION OF THE FORM 990. THE TAX CONSULTANT SUBMITS THE FILLED-UP 990 TO THE CFO FOR FINAL REVIEW AND APPROVAL. CFO SIGNED THE FORM 990 AND FILED WITH THE IRS.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

► Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

2008

Open to Public
Inspection

Name of the organization

CALIFORNIA MASONIC FOUNDATION

Employer identification number
23-7013074

FORM 990, PART VI, SECTION B, LINE 12C: AS REQUIRED, ANNUALLY, EACH MEMBER OF THE BOARD EXECUTES AND SIGNS A CONFLICT OF INTEREST DISCLOSURE STATEMENT. IN THIS STATEMENT, THE BOARD AND THE BOARD LEVEL COMMITTEE DISCLOSES KNOWN, EXISTING, POTENTIAL AND POSSIBLE CONFLICTS OF INTEREST. IF NO SUCH INTERESTS OR ACTIVITIES EXIST, THE PARTY WRITES THE WORD "NONE" IN THE SPACE PROVIDED. IN ADDITION, THESE STATEMENTS ARE UPDATED WHEN AN INTERESTED PARTY SUBSEQUENTLY BECOMES A MATTER OF BOARD ACTION. THE INTERESTED PARTY DISCLOSES THE CIRCUMSTANCES TO THE PRESIDENT OF THE BOARD OF DIRECTORS. IN THE EVENT THE INTERESTED PARTY IN QUESTION IS THE PRESIDENT OF THE BOARD, THE POTENTIAL CONFLICT IS DISCLOSED TO THE FULL BOARD. THE CONFLICT OF INTEREST DISCLOSURE STATEMENT FOR BOARD AND NON-BOARD COMMITTEE MEMBERS IS SUBMITTED TO THE PRESIDENT OF THE BOARD FOR REVIEW. THE PLANS FOR MITIGATION OF ANY CONFLICT RELATING TO BOARD MEMBERS OR NON-BOARD COMMITTEE MEMBERS ARE PRESENTED BY THE PRESIDENT TO THE BOARD AND THE GRAND MASTER. FOLLOWING THEIR REVIEW, ALL CONFLICT OF INTEREST DISCLOSURE STATEMENTS ARE KEPT ON FILE WITH THE GRAND SECRETARY.

FORM 990, PART VI, SECTION C, LINE 19: THE AUDITED FINANCIAL STATEMENTS, GOVERNING/ORGANIZING DOCUMENTS, AND CONFLICT OF INTEREST POLICY ARE AVAILABLE AT THE CORPORATE OFFICE.

FORM 990, PART XI, LINE 2 AND PART IV, LINE 12
AUDITED FINANCIAL STATEMENTS WERE NOT PREPARED FOR THE SHORT YEAR ENDED OCTOBER 31, 2009. INSTEAD, THE ORGANIZATION WILL BE ISSUING CONSOLIDATED AUDITED FINANCIAL STATEMENTS FOR THE 16 MONTHS ENDED OCTOBER 31, 2009, TO CORRESPOND WITH A CHANGE IN YEAR END.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

2008

Open to Public
Inspection

Name of the organization

CALIFORNIA MASONIC FOUNDATION

Employer identification number

23-7013074

THE CONSOLIDATED FINANCIAL STATEMENTS FOR THE PERIOD ENDED OCTOBER 31,
2009 WILL INCLUDE SEPARATE FINANCIAL INFORMATION FOR THIS ORGANIZATION,
REPORTED IN THE SUPPLEMENTAL SCHEDULES.

PER IRS INSTRUCTIONS, FORM 990, PART XI, LINE 2 AND PART IV, LINE 12
HAVE BEEN ANSWERED "NO".

Name of the organization

Employer identification number
23-7013074

CALIFORNIA MASONIC FOUNDATION

Part I Identification of Disregarded Entities

[illegible]

Part II Identification of Related Tax-Exempt Organizations

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Exempt Code section	(E) Public charity status (if section 501(c)(3))	(F) Direct controlling entity
CALIFORNIA MASONIC MEMORIAL TEMPLE - 94-1266937, 1111 CALIFORNIA STREET, SAN FRANCISCO, CA 94108	OPERATES EXCLUSIVELY AS A SUPPORTING ORGANIZATION FOR THE FOUNDATION	CALIFORNIA	501(C)(3)	11B	N/A
GRAND LODGE OF THE FREE & ACCEPTED MASONS OF CALIFORNIA - 94-0487790, 1111 CALIFORNIA STREET, SAN FRANCISCO, CA 94108	FRATERNAL ORGANIZATION	CALIFORNIA	501(C)(10)		N/A
MASONIC HOMES OF CALIFORNIA - 94-1156564 1111 CALIFORNIA STREET SAN FRANCISCO, CA 94108	CONTINUING CARE AND RETIREMENT ACTIVITY	CALIFORNIA	501(C)(3)	7	N/A

Part V Transactions With Related Organizations**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV.**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
a Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity		1a ☒
b Gift, grant, or capital contribution to other organization(s)		1b ☒
c Gift, grant, or capital contribution from other organization(s)		1c ☒
d Loans or loan guarantees to or for other organization(s)		1d ☒
e Loans or loan guarantees by other organization(s)		1e ☒
f Sale of assets to other organization(s)		1f ☒
g Purchase of assets from other organization(s)		1g ☒
h Exchange of assets		1h ☒
i Lease of facilities, equipment, or other assets to other organization(s)		1i ☒
j Lease of facilities, equipment, or other assets from other organization(s)		1j ☒
k Performance of services or membership or fundraising solicitations for other organization(s)		1k ☒
l Performance of services or membership or fundraising solicitations by other organization(s)		1l ☒
m Sharing of facilities, equipment, mailing lists, or other assets		1m ☒
n Sharing of paid employees		1n ☒
o Reimbursement paid to other organization for expenses		1o ☒
p Reimbursement paid by other organization for expenses		1p ☒
q Other transfer of cash or property to other organization(s)		1q ☒
r Other transfer of cash or property from other organization(s)		1r ☒

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(A) Name of other organization(s)	(B) Transaction type (a-r)	(C) Amount involved
(1) CALIFORNIA MASONIC TEMPLE	B	91,880
(2) GRAND LODGE OF FREE AND ACCEPTED MASONS OF CALIFORNIA	O	159,573
(3) GRAND LODGE OF FREE AND ACCEPTED MASONS OF CALIFORNIA	B	63,118
(4) GRAND LODGE OF FREE AND ACCEPTED MASONS OF CALIFORNIA	R	68,219
(5)		
(6)		

