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

2008

Department of the Treasury
Internal Revenue Service

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

For calendar year 2008, or tax year beginning Dec 1, 2008, and ending Nov 30, 2009

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 MENLO FOUNDATION, INC		A Employer identification number 95-3388159
	Number and street (or P O box number if mail is not delivered to street address) 4221 WILSHIRE BLVD	Room/suite 210	B Telephone number (see the instructions) (323) 937-1050
	City or town LOS ANGELES	State ZIP code CA 90010	C If exemption application is pending, 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		D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ 561,167.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see 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 (att sch)	3,961,043.			
	2 Ck ☐ if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	509.	509.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	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/(loss) (att sch)					
11 Other income (attach schedule)					
MISCELLANEOUS		179.			
12 Total. Add lines 1 through 11		3,961,731.	509.		
ADMINISTRATIVE AND OPERATING EXPENSES	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch)	7,571.			7,571.
	c Other prof fees (attach sch)				
	17 Interest				
	18 Taxes (attach schedule) STATE FILING FEES	150.			150.
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) See Line 23 Stmt	1,532.			1,532.
	24 Total operating and administrative expenses. Add lines 13 through 23	9,253.			9,253.
	25 Contributions, gifts, grants paid	3,582,097.			3,582,097.
26 Total expenses and disbursements. Add lines 24 and 25	3,591,350.			3,591,350.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	370,381.				
b Net investment income (if negative, enter 0)		509.			
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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing	51,091.	544,238.	544,238.
	2 Savings and temporary cash investments	1,848.	1,849.	1,849.
	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 the instructions)			
	7 Other notes and loans receivable (attach sch)	15,080.		
	Less allowance for doubtful accounts	84,052.	15,080.	15,080.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule)			
	c Investments — corporate bonds (attach schedule)			
	11 Investments — land, buildings, and equipment basis			
Less: accumulated depreciation (attach schedule)				
12 Investments — mortgage loans				
13 Investments — other (attach schedule)				
14 Land, buildings, and equipment basis				
Less: accumulated depreciation (attach schedule)				
15 Other assets (describe)				
16 Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)	136,991.	561,167.	561,167.	
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons	144,263.	198,058.	
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	144,263.	198,058.	
FUND ASSETS	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			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	-7,272.	363,109.	
	30 Total net assets or fund balances (see the instructions)	-7,272.	363,109.	
	31 Total liabilities and net assets/fund balances (see the instructions)	136,991.	561,167.	

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	-7,272.
2 Enter amount from Part I, line 27a	2	370,381.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	363,109.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	363,109.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
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]

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 the instructions) If (loss), enter -0-
in Part I, line 8

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 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 (column (b) divided by column (c))
2007	4,060,181.	546,162.	7.434023
2006	4,028,977.	1,056,020.	3.815247
2005	4,782,060.	1,788,620.	2.673603
2004	4,060,416.	1,214,561.	3.343114
2003	3,051,678.	1,185,455.	2.574267

2 Total of line 1, column (d)

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

4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5

5 Multiply line 4 by line 3

6 Enter 1% of net investment income (1% of Part I, line 27b)

7 Add lines 5 and 6

8 Enter qualifying distributions from Part XII, line 4

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

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Part VII Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see the instructions)

1 a 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	5.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	5.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	5.
6 Credits/Payments			
a 2008 estimated tax pmts and 2007 overpayment credited to 2008	6a	80.	
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	80.	
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8		
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	75.	
11 Enter the amount of line 10 to be: Credited to 2009 estimated tax	11	75.	
		Refunded	

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (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		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) CA - 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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	X	

Part VII-A Statements Regarding Activities *Continued*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(3)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	X	
14	The books are in care of ▶ <u>SAM MENLO</u> Telephone no ▶ <u>(323) 937-1050</u> Located at ▶ <u>4221 WILSHIRE BLVD #210, LOS ANGELES, CA</u> ZIP + 4 ▶ <u>90010</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			

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
1 a 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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here ▶ ☐	1 b	
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?	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 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 the instructions)	2 b	
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__		
3 a 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)	3 b	
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	4 b	X

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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 instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?**5b**

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☐ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?**6b**

If you answered 'Yes' to 6b, also file Form 8870

X

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 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
SAM MENLO 4221 WILSHIRE BLVD #210, LOS ANGELES CA 90010	DIRECTOR 5.00			
VERA MENLO 4221 WILSHIRE BLVD #210, LOS ANGELES CA 90010	DIRECTOR 5.00			

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

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
0				
0				
0				
0				

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

▶

None

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services – (see instructions). If none, enter 'NONE'.

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

None

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 N/A	
2	
3	
4	

Part IX B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1 a	
b	Average of monthly cash balances	1 b	299,513.
c	Fair market value of all other assets (see instructions)	1 c	15,080.
d	Total (add lines 1a, b, and c)	1 d	314,593.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	314,593.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	4,719.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	309,874.
6	Minimum investment return. Enter 5% of line 5	6	15,494.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	15,494.
2a	Tax on investment income for 2008 from Part VI, line 5	2 a	5.
b	Income tax for 2008 (This does not include the tax from Part VI)	2 b	
c	Add lines 2a and 2b	2 c	5.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	15,489.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	15,489.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	15,489.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1 a	3,591,350.
b	Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	3,591,350.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	5.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	3,591,345.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				15,489.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			27,253.	
b Total for prior years 20__, 20__, 20__				
3 Excess distributions carryover, if any, to 2008				
a From 2003	2,992,405.			
b From 2004	4,000,870.			
c From 2005	4,696,687.			
d From 2006	4,034,519.			
e From 2007	4,062,601.			
f Total of lines 3a through e	19,787,082.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$	3,591,350.			
a Applied to 2007, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2008 distributable amount				
e Remaining amount distributed out of corpus	3,591,350.			
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	23,378,432.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount — see instructions			27,253.	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009				15,489.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see instructions)	2,992,405.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	20,386,027.			
10 Analysis of line 9				
a Excess from 2004	4,000,870.			
b Excess from 2005	4,696,687.			
c Excess from 2006	4,034,519.			
d Excess from 2007	4,062,601.			
e Excess from 2008	3,591,350.			

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N/A

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

(4) Gross investment income

[illegible]

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

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
<i>a Paid during the year</i> SEE ATTACHED DETAILED STATEMENT LOS ANGELES CA 90010	NONE	PUBLIC CHARITY	PUBLIC SUPPORT OF ORGANIZATION'S MISSION	3,582,097.
Total			3a	3,582,097.
<i>b Approved for future payment</i>				
Total			3b	

Part XVI A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	509.	
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)				509.	
13	Total. Add line 12, columns (b), (d), and (e)				13	509.

(See worksheet in the instructions for line 13 to verify calculations)

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

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, 990-EZ and 990-PF
► See separate instructions.

OMB No 1545-0047

2008

Name of the organization

MENLO FOUNDATION, INC

Employer identification number

95-3388159

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 501(c)(____) (enter number) organization
☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
☐ 501(c)(3) taxable private foundation

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

General Rule –

- ☒ For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

Special Rules –

- ☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the Parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) ► \$ _____

Caution: Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF) but they **must** answer 'No' on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. These instructions will be issued separately.

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization

Employer identification number

MENLO FOUNDATION, INC

95-3388159

Part II Contributors (see instructions)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	SAM MENLO 4221 WILSHIRE BLVD #210 LOS ANGELES CA 90010	\$ 1,910,522.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
2	VERA MENLO 4221 WILSHIRE BLVD #210 LOS ANGELES CA 90010	\$ 1,910,521.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
3	IRWIN LOWI 237 S MCCADDEN PLACE LOS ANGELES CA 90004	\$ 140,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Form 990-PF, Page 1, Part I, Line 23

Line 23 Stmt

Other expenses:	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
BANK CHARGES	1,200.			1,200.
OFFICE EXPENSE	247.			247.
PENALTIES	85.			85.
Total	<u>1,532.</u>			<u>1,532.</u>

MENLO FOUNDATION 2009 (DECEMBER 1, 2008- NOVEMBER 30, 2009)

CHECK #	AMOUNT	DATE	VENDOR #	NAME
	100.00			ACHEINU Total
	5,000.00			AGUDAH OF CALIFORNIA Total
	1,800.00			AGUDATH ISRAEL CHESED FUND Total
	500.00			AHAVAS YISROEL SYNAGOGUE Total
	500.00			AHAVATH TORAH Total
	5,000.00			AHELET HA SHACHAR Total
	180.00			ALEINU FAMILY RESOURCE CENTER Total
	150.00			ALZHEIMER'S ASSOCIATION Total
	180.00			AMERICAN & INTERNATIONAL SOCIETY FOR YAD VASHEM Total
	300.00			American Association for Bikur Cholim Hospital Jerusalem Total
	50.00			AMERICAN CANCER SOCIETY Total
	50.00			AMERICAN COMMITTEE FOR SHAARE ZEDEK HOSPITAL JERUSALEM Total
	50.00			AMERICAN FEDERATION OF POLICE & CONCERNED CITIZENS Total
	500.00			AMERICAN FRIEND OF CHEVRON YESH Total
	6,000.00			AMERICAN FRIENDS NETIVOT HORAAN Total
	500.00			AMERICAN FRIENDS OF BIRKAS RIFK Total
	500.00			AMERICAN FRIENDS OF C.R.I.B. EF Total
	180.00			AMERICAN FRIENDS OF ERETZ Total
	400.00			AMERICAN FRIENDS OF KUPAT HAIR Total
	100.00			AMERICAN FRIENDS OF LLANIADO HOSPITAL Total
	100.00			AMERICAN FRIENDS OF MAGEN DAVID Total
	1,800.00			AMERICAN FRIENDS OF Meah Shearmin Total
	500.00			AMERICAN FRIENDS OF NINLA TAL Total
	30,000.00			AMERICAN FRIENDS OF YAD ELIEZER Total
	500.00			AMERICAN FRIENDS OF Yeshiva Shaare Chaim Total
	500.00			AMERICAN FRIENDS OF YESHIVATH TIFERETH INC. Total
	180.00			AMERICAN FRIENDS OF YESHIVOT Total
	480.00			AMERICAN SOCIETY FOR YAD VASHEM Total
	50.00			AMERICARES Total
	460.00			AMIT OF LOS ANGELES Total
	330.00			ANTI-DEFAMATION LEAGUE Total
	150.00			ARTHRITIS FOUNDATION Total
	25,000.00			ASHAR Total
	25,000.00			AYELET HASHACHAR Total
	500.00			BAIS BETZALEL Total
	6,000.00			BAIS CHANA HIGH SCHOOL Total
	2,800.00			BAIS CHANA OF CALIFORNIA WOMEN'S YESHIVA Total
	5,400.00			BAIS CHAYA MUSHKA Total
	10,500.00			BAIS GAVRIEL (SHA'AREI TORAH) Total
	147,160.00			BAIS GAVRIEL (SHAREI TORAH CHARITY FUND) Total
	1,800.00			BAIS MENACHEM Total
	22,500.00			BAIS YAAKOV SCHOOL FOR GIRLS Total
	16,500.00			Bayis Lepleitos Ateres Bonos Total
	500.00			BELZ INSTITUTIONS Total
	1,800.00			BETH AARON V'ISRAEL CHESED FUND Total
	5,000.00			BETH HATALMUD Total
	500.00			BETH MEDRASH GOVOHA Total
	1,800.00			BIKUR CHOLIM Total
	1,800.00			BIKUR CHOLIM MARKERETH FRIMA MU Total

MENLO FOUNDATION 2009 (DECEMBER 1, 2008- NOVEMBER 30, 2009)

CHECK #	AMOUNT	DATE	VENDOR #	NAME
	300.00			BIKUR CHOLIM OF PALM SPRINGS Total
	60.00			BNAI B'RITH INTERNATIONAL Total
	1,800.00			BNOS DEVORAH ELEMENTARY SCHOOL Total
	18,500.00			BNOS DEVORAH HIGH SCHOOL Total
	48,000.00			BNOS ESTER Total
	150.00			BRAILLE INSTITUTE Total
	50.00			C.I.O. OF ARGENTINA Total
	1,800.00			CAMP HASC Total
	100.00			CARE FOR ISRAEL- ADIKIM Total
	50.00			CARMEI HA'IR Total
	500.00			CENTER FOR TORAH VDCHESED Total
	1,000.00			CHABAD OF BOCA RATON Total
	1,800.00			CHABAD OF BURBANK Total
	66,800.00			CHABAD OF GREATER LOS FELIZ Total
	14,100.00			CHABAD OF LARCHMONT Total
	10,000.00			CHABAD OF MILL VALLEY Total
	25,000.00			CHABAD OF PACIFIC NORTHWEST Total
	20,000.00			CHABAD OF SOUTH LaCIENEGA Total
	500.00			CHABAD OF THE VALLEY Total
	180.00			CHABAD OF WINNIPEG JEWISH LEARNING INSTITUTE Total
	1,000.00			CHABAD on Fairfax Total
	500.00			CHAI LIFELINE ART THERAPY PROGR Total
	5,000.00			CHAIM V'CHESED Total
	100.00			CHAMAH Total
	100.00			CHAYE OLAM PRAYER AND TORAH FUND Total
	85,200.00			CHEDER MENACHEM Total
	360.00			CHEVRA KADISHA CHARITY FUND Total
	180.00			CHILD SURVIVORS OF THE HOLOCAUS Total
	20.00			CHILDRENS HUNGER RELIEF FUND Total
	50.00			COALITION'S EMERGENCY FINANCIAL PROGRAM Total
	500.00			COLEL CHABAD Total
	30,000.00			CONG. OHEL YITZCHOK Total
	10,000.00			CONG. TORAS CHAIM D'FLATBUSH Total
	1,800.00			CONG. YESHIVA "BETH HILLEL" Total
	500.00			CONGREGATION OR HACHAIM Total
	10,000.00			CONGREGATION Zichron Yocheskel Total
	650.00			CONGREGATION ANSHEI SFARD OF WESLEY HILLS Total
	1,000.00			CONGREGATION ATZEI Total
	1,000.00			CONGREGATION BAIS BEZALEL Total
	1,360.00			CONGREGATION BAIS NAFTOLI Total
	1,500.00			CONGREGATION BAIS SCHMUEL Total
	1,600.00			CONGREGATION BAIS YAKOV YOSEF Total
	1,200.00			CONGREGATION BAIS YEHUDAH Total
	500.00			CONGREGATION BNEI AHARON Total
	500.00			CONGREGATION DARKEI TSHUVA Total
	138,360.00			Congregation ETZ Chaim of Hancock Park Total
	500.00			CONGREGATION KAHAL YIREI HASHEM Total
	5,000.00			CONGREGATION KEHILAS YAAKOV Total
	180.00			CONGREGATION KEHILLAS YITZCHOK Total
	1,000.00			CONGREGATION KOLEL AVREICHIM OF CHASIDEL BRESLAV Total

MENLO FOUNDATION 2009 (DECEMBER 1, 2008- NOVEMBER 30, 2009)

CHECK #	AMOUNT	DATE	VENDOR #	NAME
	1,000.00			CONGREGATION KOSON Total
	106,110.00			CONGREGATION LEV YITZCHOK Total
	5,000.00			CONGREGATION MOSDOS AMROM CHASI Total
	5,000.00			CONGREGATION MOSDOS AMROM CHASIDA Total
	500.00			CONGREGATION OHEL TORAH Total
	20,000.00			CONGREGATION OHEL YITZCHOK Total
	200.00			CONGREGATION OHR SIMCHA Total
	1,000.00			CONGREGATION OSEH TZEDOKO VOCHE Total
	500.00			CONGREGATION SHAAREI TEFILA Total
	500.00			CONGREGATION TIFERES AVRAHAM Total
	180.00			CONGREGATION TZEMACH TZEDAKA Total
	500.00			CONGREGATION YAD MOSHE Total
	3,000.00			CONGREGATION YESHIVA KARLIN STO Total
	500.00			DENVER COMMUNITY KOLLEL Total
	500.00			DERECH CHAIM Total
	1,800.00			DETROIT TEACHERS SEMINARY Total
	50.00			DISABLED AMERICAN VETERANS Total
	60.00			DISABLED VETERANS FOUNDATION, INC. Total
	100.00			DISKIN ORPHAN HOME OF ISRAEL Total
	5,000.00			ECHO Total
	180.00			EDUCATIONAL OPPORTUNITY FUND AI Total
	250.00			EIN OD MILVADO Total
	33,166.00			EMEK HEBREW ACADEMY Total
	100.00			EMERGENCY MATZOH FUND Total
	950.00			EMUNAH WOMEN Total
	36,000.00			ETTA ISRAEL CENTER Total
	180.00			EZER MIZION Total
	100.00			EZRAS CHOILIM Total
	40.00			FEEDING AMERICA Total
	5,000.00			FRIENDS OF AHAVAT SHALOM Total
	1,100.00			FRIENDS OF BINYAN HAOLAM Total
	100.00			FRIENDS OF ISRAEL DISABLED VETE Total
	2,500.00			FRIENDS OF MEOR ISRAEL Total
	100.00			FRIENDS OF SIFSEI TZADIK Total
	100.00			FRIENDS OF TORAH INSTITUTIONS Total
	500.00			FRIENDS OF YESHIVA OHR ELCHONON Total
	500.00			Friends of Yeshiva Shaar Hatalmud Total
	750.00			FRIENDS OF YESHIVATH LELUV OF JERUSALEM Total
	300.00			GENERAL ISRAEL ORPHANS HOME FOR GIRLS Total
	20.00			GENERAL SINGLAUB COALITION TO SALUTE AMERICA'S Total
	200.00			GIRLS' TOWN/OR CHADASH Total
	9,000.00			HACHNASSAT KALLAH OF GREATER L. Total
	180.00			HADAR-ZION Total
	500.00			HALACHA L'MOSHE Total
	1,800.00			HATZOLAH OF LOS ANGELES Total
	500.00			HAVERIM Total
	15,275.00			HEBREW ACADEMY COMM. SCHOOL Total
	200.00			HEBREW IMMIGRANT AID SOCIETY Total
	280.00			HIAS, INC. Total
	500.00			HINDY COHEN MEMORIAL FUND Total

MEÑLO FOUNDATION 2009 (DECEMBER 1, 2008- NOVEMBER 30, 2009)

CHECK #	AMOUNT	DATE	VENDOR #	NAME
	180.00			IGUD MOSDOS WIZNITZ OF ISRAEL Total
	1,800.00			IMREI YEHUDA SEKELHID INSTITUTI Total
	280.00			ISRAEL CANCER RESEARCH FUND Total
	180.00			ISRAEL CHILDREN'S CANCER FOUNDA Total
	200.00			ISRAEL SPECIAL KIDS FUND Total
	50.00			JERUSALEM OPEN HOUSE LINAS HACHESED Total
	15,000.00			JETS - JEWISH EDUCATIONALTRADE SCH. Total
	5,000.00			JEWISH CHILDREN'S FUND Total
	1,000.00			JEWISH HERITAGE CENTER OF QUEENS AND LONG ISLAND Total
	180.00			JEWISH LEARNING EXCHANGE Total
	86.00			JEWISH WAR VETERANS OF THE USA Total
	3,600.00			JFS FAMILY VIOLIN PROJECT Total
	50.00			JUNIOR BLIND OF AMERICA Total
	60.00			KCET Total
	1,000.00			KEDUSHAT ZION Total
	500.00			KEHILLAT YAVNEH Total
	100.00			KEREN ELUZAR Total
	1,000.00			KEREN HAYELED Total
	150.00			KEREN OR, INC. Total
	6,250.00			KEREN ORAH Total
	3,200.00			KEREN ZICHRON MOSHE Total
	25,000.00			KIDS OF COURAGE Total
	100.00			KIMPATORIN AID Total
	2,675.40			KIRSHET BOYS CAMP Total
	7,000.00			KOL YACOB YEHUDA Total
	180.00			KOL YISROEL AREVIM ISRAEL CHARITY FUND Total
	360.00			KOLEL SHOMRE HACHOMOS Total
	1,800.00			Kollel Bais Talmud Lehoruah Karlsburg Total
	180.00			KOLLEL HOROEH Total
	3,600.00			Kollel L'Mechanchim Zichron Yaakov Total
	5,000.00			KOLLEL LOS ANGELES Total
	180.00			KOLLEL TORAS CHAIM Total
	67,000.00			KOLLEL YECHIEL YEHUDA Total
	1,800.00			KOLLEL ZICHRON SHNEUR Total
	37,500.00			L.A. COUNCIL OF JEWISH ORGANIZA Total
	500.00			LADIES AUXILIARY OF BOBOVER YES BNEI ZION Total
	100.00			LECHEM LAR'EVIM Total
	95,000.00			LEV AVROHOM Total
	180.00			LEV L'TAMID Total
	5,000.00			LOS ANGELES CHEDER & BAIS TZIV Total
	250.00			LOS ANGELES COMMUNITY ERUV Total
	1,800.00			LOS ANGELES MESIVTA Total
	2,500.00			MAASEH CHESED GEMACH Total
	11,800.00			MAAYON YISROEL Total
	30,760.00			MAIMONDIES HEBREW ACADEMY Total
	1,800.00			MAIMONIDES JEWISH DAY SCHOOL Total
	12,180.00			MARBEH TZEDAKAH Total
	3,200.00			MASTER-MIND Total
	500.00			MATAN B'SETER Total
	15,000.00			MECHON L'HOYROA Total

MENLO FOUNDATION 2009 (DECEMBER 1, 2008- NOVEMBER 30, 2009)

CHECK #	AMOUNT	DATE	VENDOR #	NAME
	100.00			MERCAZ BETH JACOB IN ISRAEL Total
	1,000.00			MERKAZ CHASIDAY WIZNITZ Total
	10,000.00			MERKAZ HATORAH COMMUNITY KOLLEL Total
	100.00			MERKAZ HATORAH YACHEL YISROEL-SERET WIZNITZ Total
	500.00			MERKAZ MOSDOS CHINUCH Total
	500.00			MESAMCHE LEV Total
	50.00			MESIFTA BETH SHRAGA Total
	50.00			MESIVTA BAIS SHRAGA Total
	1,000.00			MESIVTA BEVET CHAZON ISH Total
	5,000.00			MESIVTA MEOR YITZCHAK Total
	520.00			MESIVTA OF GREATER LOS ANGELES Total
	1,000.00			MESIVTA YESHIVA RABBI CHIAM BER Total
	86.00			MESORAH HERITAGE FOUNDATION Total
	1,000.00			MESORAS MORDECHAI Total
	500.00			MIKDASH MELECH Total
	500.00			MINCHAS ELAZAR Total
	1,800.00			MOSDOS BNOS FRIMA Total
	200.00			MOSDOS CHASIDEI SQUARE Total
	5,000.00			MOSDOS KASHO Total
	100.00			MOSDOS SADOGORA Total
	30.00			MOUTH AND FOOT PAINTING ARTIST Total
	100.00			MTI PESACH FOOD DRIVE Total
	100,000.00			MUNKACS TORAH ACADEMY, INC. Total
	250.00			MUSEUM OF TOLERANCE Total
	500.00			NACHLAT NAFTALI FOUNDATION Total
	100.00			NATIONAL FEDERATION OF THE BLIN Total
	80.00			NATIONAL LAW ENFORCEMENT OFFICERS MEMORIAL FUND Total
	200.00			NATIONAL MULTIPLE SCLEROSIS SOCIETY SOUTHERN C.A. CHAPTER Total
	12,500.00			NEIR ARYEH Total
	250.00			NER ISRAEL RABBINICAL COLLEGE Total
	10,000.00			NEVE YERUSHALAYIM Total
	500.00			NEW ENGLAND RABBINICAL COLLEGE Total
	200.00			NOAM HATORAH Total
	150.00			NORTH AMERICAN CONFERENCE ON ETHIOPIAN JEWRY Total
	700.00			OD YOSEF CHAI Total
	5,000.00			OHEV SHALOM CONGREGATION Total
	5,000.00			OHR CHANA VOCATIONAL Total
	500.00			OHR CHODOSH Total
	15,000.00			OHR ELCHONON CHABAD Total
	100.00			OHR YAAKOV Total
	510.00			OORAH Total
	1,000.00			OR SHALOM V'CHESED JERUSALEM Total
	5,000.00			ORH HAGONUZ Total
	50.00			ORHAN HOSPITAL WARD OF ISRAEL Total
	55.00			PARALYZED VETERANS OF AMERICA Total
	150.00			PONEVEZ YESHIVA-BATAY AVOTH Total
	100.00			PRESBURGER YESHIVA IN JERUSALEM Total
	2,000.00			PRIVATE REDEMPTION Total
	100,000.00			PROJECT EXTREME Total
	1,000.00			RABBI JACOB JOSEPH SCHOOL Total

MENLO FOUNDATION 2009 (DECEMBER 1, 2008- NOVEMBER 30, 2009)

CHECK #	AMOUNT	DATE	VENDOR #	NAME
	5,000.00			RABBINICAL COLLEGE "KNESSETH ISR OF SLABODKA, INC. Total
	360.00			RABBINICAL SEMINARY OF AMERICA Total
	500.00			RASHBY Total
	2,500.00			RECOVERY THROUGH TORAH Total
	500.00			REFAEINU Total
	5,000.00			ROHR BAIS CHAYA Total
	500.00			RUAH INSTITUTE Total
	500.00			SHAAREI CHESED Total
	180.00			SHAAREI TEFILA TORAH FUND Total
	100.00			SHAAREY ZEDEK Total
	1,800.00			SHALOM TORAH CENTERS Total
	500.00			SIMCHAT TZION Total
	15,000.00			SOUTH FLORIDA JEWISH ACADEMY Total
	25.00			SOUTHERN POVERTY LAW CENTER Total
	100.00			SPECIAL OLYMPICS SOUTHERN CALIFORNIA Total
	7,500.00			STAM GEMILAS CHESED FUND. INC. Total
	1,000.00			SULAM Total
	180.00			T.E.P. Total
	5,000.00			TALMUDICAL INSTITUTE OF Total
	1,000.00			TEEN CENTER Total
	18,000.00			TELSHE YESHIVA CHICAGO Total
	18,000.00			TELSHE YESHIVA RABBINICAL COLLEGE OF TELSHE (OHIO) Total
	26,800.00			THE FRIENDSHIP CIRCLE Total
	360.00			THE HEBREW IMMIGRANT AID SOCIETY Total
	380.00			THE HOME OF THE SAGES OF ISRAEL Total
	50.00			THE JERUSALEM OPEN HOUSE Total
	100.00			THE JERUSALEM ORPHAN HOME Total
	100.00			THE JEWISH FEDERATION Total
	50.00			THE JEWISH GUILD FOR THE BLIND Total
	150.00			THE JEWISH INSTITUTE FOR THE BLIND JERUSALEM INC. Total
	380.00			THE NATIONAL CHILDREN'S CANCER SOCIETY Total
	200.00			THE PITTSBURG INSTITUTIONS ISRAEL Total
	100.00			THE TZEDAKAH FUND Total
	1,800.00			TIFERES ACHIM Total
	1,000.00			TIFERES MIRIAM Total
	300.00			TIFERET SHLOMO ORPHAN HOME Total
	100.00			TIKVAH LAYELED FOUNDATION Total
	5,000.00			TOLDOS AHARON Total
	16,350.00			TOMCHAI TORAH B'ERETZ YISRAEL Total
	25,000.00			TOMCHEI SHABBOS Total
	118,495.00			TOMCHEI TORAH INSTITUTE Total
	1,000.00			TOMCHEI YOTZEI Total
	57,000.00			TORAH EMETH ACADEMY YESHIVA RAV ISACSOHN Total
	100.00			TORAH SCHOOLS FOR ISRAEL Total
	200.00			TORAH V'CHESED Total
	5,000.00			TZEDAKAH V'CHESED Total
	12,800.00			TZEDOKO FUND Total
	500.00			TZIDKATH YOSEF NAPHTALI Total
	180.00			UNITED INSTITUTIONS OF JERUSALE Total
	200.00			UNITED JEWISH FUND JEWISH FEDERATION COUNCIL Total

MEMLO FOUNDATION 2009 (DECEMBER 1, 2008- NOVEMBER 30, 2009)

CHECK #	AMOUNT	DATE	VENDOR #	NAME
	25,000.00			UNITED JEWISH WELFARE FUND-TORO Total
	200.00			UNITED SOUP KITCHENS Total
	25.00			UNITED STATES DEPUTY SHERIFFS ASSOC Total
	180.00			UNITED STATES HOLOCAUST MEMORIA Total
	50.00			USC/NORRIS COMPREHENSIVE CANCER CENTER Total
	290.00			VAAD HaRABBANIM Total
	100.00			VAAD L'HATZOLAS NIDCHEI YISROEL Total
	100.00			VAAD L'MAAN YAHADUS Total
	200.00			VADAT NASHIM FOR FREE KITCHEN Total
	700,000.00			VALLEY TORAH HIGH SCHOOL Total
	300.00			VISTA DEL MAR CHILD AND FAMILY Total
	66,200.00			WEST COAST VA'AD HaCHESED Total
	6,500.00			WOMEN BIKUR CHOLIM SOCIETY Total
	25.00			WOUNDED WARRIOR PROJECT Total
	500.00			YAD EPHRAIM Total
	380.00			YAD L'ACHIM Total
	50.00			YESHIVA BAIS BINYOMIN Total
	400.00			YESHIVA BAIS HACHINUCH Total
	68.00			YESHIVA DERECH CHAIM Total
	7,500.00			YESHIVA GEDOLA WATERBURY Total
	50.00			YESHIVA GEDOLAH BAIS YISROEL Total
	116,100.00			YESHIVA GEDOLAH OF LOS ANGELES Total
	1,800.00			YESHIVA GEDOLAH OF MIDWOOD Total
	500.00			YESHIVA KESER DOVID Total
	15,000.00			YESHIVA LEV AVRAHAM Total
	5,580.00			YESHIVA MACHZIKEI HADAS Total
	500.00			YESHIVA MAMAR MORDECHAI NADVORN Total
	36.00			YESHIVA OF FAR ROCKAWAY Total
	12,500.00			YESHIVA OF THE TELSHE ALUNMI Total
	103,800.00			YESHIVA OHR ELCHONON CHABAD WEST COAST TALMUDICAL SEMINARY Total
	7,500.00			YESHIVA OHR HAMEIR Total
	41,000.00			YESHIVA OHR YISRAEL OF ATLANTA Total
	1,800.00			YESHIVA PISHEI SHEARIM Total
	50,250.00			YESHIVA RAV ISACSOHN Total
	860.00			YESHIVA SHAAR HATALMUD Total
	1,000.00			YESHIVA SHAAREI TORAH Total
	1,000.00			YESHIVA SHAAREY YOSHER Total
	25,000.00			YESHIVA TORAH CHAIM Total
	5,000.00			YESHIVA TORAH TEMIMAH Total
	300.00			YESHIVA TORAS EMES Total
	250,000.00			YESHIVAS MIR YERUSHALAYIM Total
	1,800.00			YESHIVAT YAVNEH Total
	1,800.00			YESHIVATH KNESSET HEZEKIAH Total
	5,000.00			YESIVA HACHAYIM OF L.A. Total
	250.00			YETEV LEV JERUSALEM Total
	1,500.00			ZEH LAZEH Total
	250.00			ZIMMER CHILDREN MUSEUM Total
	200.00			ZION ORPHAN HOME FOR BOYS Total
	3,582,097.40			Grand Total

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension — check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request an extension of time to file income tax returns

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonprofits

Type or print File by the due date for filing your return. See instructions	Name of Exempt Organization	Employer identification number
	MENLO FOUNDATION, INC	95-3388159
	Number, street, and room or suite number. If a P.O. box, see instructions	
	4221 WILSHIRE BLVD, #210	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	LOS ANGELES	CA 90010

Check type of return to be filed (file a separate application for each return)

- | | | |
|---|--|------------------------------------|
| ☐ Form 990 | ☐ Form 990-T (corporation) | ☐ Form 4720 |
| ☐ Form 990-BL | ☐ Form 990-T (section 401(a) or 408(a) trust) | ☐ Form 5227 |
| ☐ Form 990-EZ | ☐ Form 990-T (trust other than above) | ☐ Form 6069 |
| ☒ Form 990-PF | ☐ Form 1041-A | ☐ Form 8870 |

- The books are in the care of ► **SAM MENLO**

Telephone No ► **(323) 937-1050** FAX No ► **(323) 937-0998**

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **Jul 15**, 20 **10**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ☐ calendar year 20__ or
- ☒ tax year beginning **Dec 1**, 20 **08**, and ending **Nov 30**, 20 **09**.

2 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	0.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	80.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

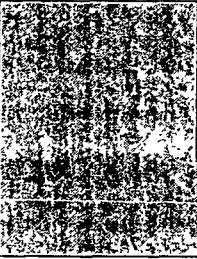
BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.Form **8868** (Rev 4-2008)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. You must file original and one copy.

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization		Employer identification number
	MENLO FOUNDATION, INC		95-3388159
	Number, street, and room or suite number. If a P.O. box, see instructions.		For IRS use only
	4221 WILSHIRE BLVD, #210		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	LOS ANGELES CA 90010		

Check type of return to be filed (File a separate application for each return)

- | | | | |
|--------------------------------------|--|--------------------------------------|------------------------------------|
| ☐ Form 990 | ☒ Form 990-PF | ☐ Form 1041-A | ☐ Form 6069 |
| ☐ Form 990-BL | ☐ Form 990-T (section 401(a) or 408(a) trust) | ☐ Form 4720 | ☐ Form 8870 |
| ☐ Form 990-EZ | ☐ Form 990-T (trust other than above) | ☐ Form 5227 | |

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in care of **SAM MENLO**

Telephone No. **(323) 937-1050** FAX No. **(323) 937-0998**

- If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **Oct 15**, 20 **10**.

5 For calendar year _____, or other tax year beginning **Dec 1**, 20 **08**, and ending **Nov 30**, 20 **09**.

6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension **ALL OF THE INFORMATION NEEDED TO FILE A**

COMPLETE AND ACCURATE RETURN WILL NOT BE AVAILABLE BY JULY 15, 2010.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a \$	0.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b \$	80.
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instrs.	8c \$	0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature  Title **ACCOUNTANT**

Date **6/2/10**