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Form **990-PF**Department of the Treasury  
Internal Revenue Service (77)**Return of Private Foundation**  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

OMB No 1545-0052

**2009**

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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS  
label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.

Name of foundation

David L Klein, Jr Foundation

Number and street (or P O box number if mail is not delivered to street address)

720 Market Street

Room/suite

900

City or town, state, and ZIP code

San Francisco

CA

94102

A Employer identification number

13-6085432

B Telephone number (see page 10 of the instructions)

(415) 677-9700

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test,  
check here and attach computation ☐E If private foundation status was terminated  
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ☐H Check type of organization ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end  
of year (from Part II, col (c),  
line 16) ▶ \$ 10,976,951J Accounting method ☒ Cash ☐ Accrual  
☐ Other (specify) \_\_\_\_\_  
(Part I, column (d) must be on cash basis)**Part I Analysis of Revenue and Expenses** (The total of  
amounts in columns (b), (c), and (d) may not necessarily equal  
the amounts in column (a) (see page 11 of the instructions) )

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>				
1 Contributions, gifts, grants, etc., received (attach schedule)	2,500			
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	3,058	3,058		
4 Dividends and interest from securities	356,814	356,814		
5 a Gross rents				
b Net rental income or (loss)				
6 a Net gain or (loss) from sale of assets not on line 10	-96,641			
b Gross sales price for all assets on line 6a 564,101				
7 Capital gain net income (from Part IV, line 2)		0		
8 Net short-term capital gain				
9 Income modifications				
10 a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	2,025	84		
12 Total. Add lines 1 through 11	267,756	359,956		
<b>Operating and Administrative Expenses</b>				
13 Compensation of officers, directors, trustees, etc				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16 a Legal fees (attach schedule)				
b Accounting fees (attach schedule)	549			549
c Other professional fees (attach schedule)	79,038	19,749		59,289
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions)	2,900			
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings	7,580			7,580
22 Printing and publications				
23 Other expenses (attach schedule)	57,374	3,368		54,006
24 Total operating and administrative expenses. Add lines 13 through 23	147,441	23,117		121,424
25 Contributions, gifts, grants paid	804,750			804,750
26 Total expenses and disbursements. Add lines 24 and 25	952,191	23,117		926,174
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-684,435			
b Net investment income (if negative, enter -0-)		336,839		
c Adjusted net income (if negative, enter -0-)				

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the Instructions.

Form 990-PF (2009)

(HTA)

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	1,696,071	865,903	865,903
	3 Accounts receivable ▶	2,159		
	Less: allowance for doubtful accounts ▶		2,159	2,159
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10 a Investments—U S. and state government obligations (attach schedule)	1,836,235	2,064,973	2,188,622
	b Investments—corporate stock (attach schedule)	6,897,186	6,934,386	6,257,725
	c Investments—corporate bonds (attach schedule)	1,297,944	1,328,167	1,388,874
	11 Investments—land, buildings, and equipment basis ▶			
Less: accumulated depreciation (attach schedule) ▶				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	520,843	368,256	273,668	
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 the instructions. Also, see page 1, item I)	12,248,279	11,563,844	10,976,951	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	12,248,279	11,563,844	
	30 Total net assets or fund balances (see page 17 of the instructions)	12,248,279	11,563,844	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	12,248,279	11,563,844		

## 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	12,248,279
2 Enter amount from Part I, line 27a	2	-684,435
3 Other increases not included in line 2 (itemize) ▶	3	0
4 Add lines 1, 2, and 3	4	11,563,844
5 Decreases not included in line 2 (itemize) ▶	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	11,563,844

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a Publicly-traded Securities</b>				
<b>b Passthrough K1 Capital Gain / Loss (Non UBI)</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(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)	
<b>a</b> 616,421		660,741	-44,320	
<b>b</b> -52,320			-52,320	
<b>c</b>				
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(l) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
<b>a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2 Capital gain net income or (net capital loss)</b> { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		<b>2</b>	-96,640	
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)</b> If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8		<b>3</b>		

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

**1** Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	944,961	11,871,650	0.079598
2007	818,805	14,084,774	0.058134
2006	857,429	13,588,200	0.063101
2005	831,795	13,411,267	0.062022
2004	742,153	13,700,786	0.054169
<b>2 Total of line 1, column (d)</b>			<b>2</b> 0.317024
<b>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</b>			<b>3</b> 0.063405
<b>4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5</b>			<b>4</b> 10,545,485
<b>5 Multiply line 4 by line 3</b>			<b>5</b> 668,636
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>			<b>6</b> 3,368
<b>7 Add lines 5 and 6</b>			<b>7</b> 672,004
<b>8 Enter qualifying distributions from Part XII, line 4</b> If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.			<b>8</b> 926,174

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)				
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	3,368	
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0	
3 Add lines 1 and 2		3	3,368	
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4		
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		5	3,368	
6 Credits/Payments.				
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	6,900		
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	6,900		
8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0		
9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	0		
10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	3,532		
11 Enter the amount of line 10 to be <b>Credited to 2010 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input checked="" type="checkbox"/>	11	0		

**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 page 19 of the instructions for definition)? <i>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</i>		X
c Did the foundation file <b>Form 1120-POL</b> 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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>		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? <i>If "Yes," attach a conformed copy of the changes</i>		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 <b>Form 990-T</b> for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>		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? <i>If "Yes," complete Part II, col (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input type="checkbox"/> NY		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		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)(13)? If "Yes," attach schedule (see page 20 of the 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?	13	X	
Website address <b>▶</b> _____				
14	The books are in care of <b>▶</b> Stephanie Fuerstner Gillis Telephone no <b>▶</b> (415) 677-9700			
	Located at <b>▶</b> 720 Market Street, Suite 900, San Francisco, CA ZIP+4 <b>▶</b> 94102			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <b>▶</b> 15			

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	X
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 2009? <input type="checkbox"/>	1c	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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <b>▶</b> 20____, 20____, 20____, 20____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <b>▶</b> 20____, 20____, 20____, 20____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2009 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 2009)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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 2009?	4b	X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)****5a** During the year did the foundation pay or incur any amount to(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?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? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

5b	N/A	
6b		X
7b	N/A	

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE ATTACHMENT				

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

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

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

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)****3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Foundation Source Inc 55 Walls Drive, 3rd Floor, Fairfield, CT 06824	Administrative Services	52,641
Blueprint Research & Design, Inc 720 Market Street, Suite 900, San Francisco, CA 94102	Philanthropic Consultant	59,289

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

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Expenses

1

2

3

4

**Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1

2

All other program-related investments. See page 24 of the instructions.

3

Total. Add lines 1 through 3



0



**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	8,984,218
<b>b</b>	Average of monthly cash balances	<b>1b</b>	1,448,190
<b>c</b>	Fair market value of all other assets (see page 24 of the instructions)	<b>1c</b>	273,668
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	10,706,076
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	10,706,076
<b>4</b>	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	<b>4</b>	160,591
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	10,545,485
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	527,274

**Part XI Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	527,274
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	3,368
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	3,368
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	523,906
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0
<b>5</b>	Add lines 3 and 4	<b>5</b>	523,906
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	523,906

**Part XII Qualifying Distributions** (see page 25 of the instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	<b>1a</b>	926,174
<b>b</b>	Program-related investments—total from Part IX-B	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	0
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	926,174
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	<b>5</b>	3,368
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	922,806

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII Undistributed Income** (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				523,906
<b>2</b> Undistributed income, if any, as of the end of 2009.				
<b>a</b> Enter amount for 2008 only			0	
<b>b</b> Total for prior years 20____, 20____, 20____		0		
<b>3</b> Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004	72,204			
<b>b</b> From 2005	181,982			
<b>c</b> From 2006	207,270			
<b>d</b> From 2007	123,318			
<b>e</b> From 2008	359,192			
<b>f</b> Total of lines 3a through e	943,966			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 926,174				
<b>a</b> Applied to 2008, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
<b>c</b> Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
<b>d</b> Applied to 2009 distributable amount				523,906
<b>e</b> Remaining amount distributed out of corpus	402,268			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a) )	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,346,234			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b		0		
<b>c</b> 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				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		0		
<b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
<b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	72,204			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,274,030			
<b>10</b> Analysis of line 9.				
<b>a</b> Excess from 2005	181,982			
<b>b</b> Excess from 2006	207,270			
<b>c</b> Excess from 2007	123,318			
<b>d</b> Excess from 2008	359,192			
<b>e</b> Excess from 2009	402,268			



**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
<b>a</b> <i>Paid during the year</i>				
AMERICAN TRUST FOR THE BRITISH LBRY 500 5TH AVE FL 50 NEW YORK NY 10110	N/A	509(a)(1)	British Library Hebrew Manuscripts Cataloging	4,000
BREARLEY SCHOOL 610 E 83RD ST NEW YORK NY 10028	N/A	509(a)(1)	Scholarship Fund	2,500
BROOKLYN ACADEMY OF MUSIC INC 30 LAFAYETTE AVE BROOKLYN NY 11217	N/A	509(a)(1)	Bridge Project	30,000
BROWN UNIVERSITY PROVIDENCE 164 ANGELL ST PROVIDENCE RI 02912	N/A	509(a)(1)	General & Unrestricted	2,500
CHINATOWN HEALTH CLINIC FOUNDATION INC 268 CANAL ST NEW YORK NY 10013	N/A	509(a)(1)	General & Unrestricted	1,000
CIR. OF WOMN REACH TEACH ACROSS BORDER PO BOX 381365 CAMBRIDGE MA 02238	N/A	509(a)(1)	General & Unrestricted	1,000
COMM. ALLIANCE WITH FAMILY FARMERS FDN PO BOX 363 DAVIS CA 95617	N/A	509(a)(1)	General & Unrestricted	10,000
COMPASSION AND CHOICES PO BOX 101810 DENVER CO 80250	N/A	509(a)(2)	General & Unrestricted	2,000
CONNECTICUT COLLEGE 270 MOHEGAN AVE NEW LONDON CT 06320	N/A	509(a)(1)	General & Unrestricted	2,500
CORNWALL LIBRARY ASSOCIATION PO BOX 126 CORNWALL CT 06753	N/A	509(a)(1)	General & Unrestricted	500
EARTHJUSTICE 426 17TH ST FL 6 OAKLAND CA 94612	N/A	509(a)(2)	General & Unrestricted	20,000
EAST COAST ASIAN AMERICAN STUDENT UNION 2 WAHACKME LN NEW CANAAN CT 06840	N/A	509(a)(1)	General & Unrestricted	1,000
ENVIRONMENTAL PROTECTION INFO. CTR PO BOX 397 GARBERVILLE CA 95542	N/A	509(a)(1)	General & Unrestricted	20,000
FARM TO CONSUMER FOUNDATION 8116 ARLINGTON BLVD FALLS CHRCH, VA 22042	N/A	509(a)(1)	Farm to Consumer Legal Defense Fund	1,000
FOOD RUNNERS 271 FRANCISCO ST SAN FRANCISCO CA 94133	N/A	509(a)(1)	General & Unrestricted	2,000
FRICK COLLECTION 1 E 70TH ST NEW YORK NY 10021	N/A	509(a)(1)	Drawings from Ribera to Goya	25,000
<b>Total</b> . . . See Attached Statement . . . . .			<b>3a</b>	804,750
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . .			<b>3b</b>	0

## 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)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See page 28 of the instructions )
<b>1</b>	Program service revenue					
<b>a</b>						
<b>b</b>						
<b>c</b>						
<b>d</b>						
<b>e</b>						
<b>f</b>						
<b>g</b>	Fees and contracts from government agencies					
<b>2</b>	Membership dues and assessments					
<b>3</b>	Interest on savings and temporary cash investments			14	3,058	
<b>4</b>	Dividends and interest from securities			14	356,814	
<b>5</b>	Net rental income or (loss) from real estate					
<b>a</b>	Debt-financed property					
<b>b</b>	Not debt-financed property					
<b>6</b>	Net rental income or (loss) from personal property					
<b>7</b>	Other investment income					
<b>8</b>	Gain or (loss) from sales of assets other than inventory			18	-96,641	
<b>9</b>	Net income or (loss) from special events					
<b>10</b>	Gross profit or (loss) from sales of inventory					
<b>11</b>	Other revenue <b>a</b> Federal Tax Refund			01	1,941	
<b>b</b>	K-1 Pass-Through Income			14	84	
<b>c</b>						
<b>d</b>						
<b>e</b>						
<b>12</b>	Subtotal Add columns (b), (d), and (e)		0		265,256	0
<b>13</b>	Total. Add line 12, columns (b), (d), and (e)				13	265,256

(See worksheet in line 13 instructions on page 28 to verify calculations )

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

[illegible]

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

- |  |                   |                  |
|--|-------------------|------------------|
| <p><b>1</b> Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p> <p><b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p><b>b</b> Other transactions</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p><b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p><b>d</b> If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.</p> | <p><b>Yes</b></p> | <p><b>No</b></p> |
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[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date \_\_\_\_\_

Title

**Sign Here**

**Paid  
Repairer's  
Use Only**

Preparer's  
signature

**Jeffrey D. Haskell**

Date \_\_\_\_\_

7/29/2010

Check if self-employed ☐

Preparer's identifying  
number (see **Signature** on  
page 30 of the instructions)

Firm's name (or yours if self-employed), address, and ZIP code

### FOUNDATION SOURCE

55 WALLS DRIVE, FAIRFIELD, CT 06824

EIN ►

Phone no (800) 839-1754

Form 990-PF, Part I, Line 11 - Other Income

TOTAL:		2,025	84
		(a) Expenses per Books	(b) Net Investment Income
1	Federal Tax Refund	1,941	0
2	ZF PARTNERS LP K-1 Pass-Through Share of Partnership Income/(Loss)	84	84
3			
4			
5			
6			
7			
8			
9			
10			

**Form 990-PF, Part I, Line 16b - Accounting Fees**

TOTAL:					549	0	0	549
		(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose			
1	Accounting Services	549	0		549			
2								
3								
4								
5								
6								
7								
8								
9								
10								



**Form 990-PF, Part I, Line 16c - Other Professional Fees**

TOTAL:		79,038	19,749	0	59,289
		(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
1	Investment Management Services	19,749	19,749		0
2	Philanthropic Consultant	59,289	0		59,289
3					
4					
5					
6					
7					
8					
9					
10					

**Form 990-PF, Part I, Line 18 - Taxes**

TOTAL:		(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
		2,900	0	0	0
1	Estimated tax for 2009	2,900	0		0
2					
3					
4					
5					
6					
7					
8					
9					
10					

**Form 990-PF, Part I, Line 23 - Other Expenses**

TOTAL:					57,374	3,368	0	54,006
		(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose			
1	Administrative Fees	52,641	0	0	52,641			
2	Bank Charge	25	25		0			
3	Foundation Dues & Memberships	495	0		495			
4	K-1 pass-through ZF PARTNERS LP	3,343	3,343		0			
5	Local newspaper ad in satisfaction of public disclosure requirements	120	0		120			
6	State or local filing fees	750	0		750			
7								
8								
9								
10								

## Form 990-PF, Part II, Line 10a - Investments: US &amp; State Government Obligations

		TOTAL:	2,048,802	2,064,973	2,188,622
	Description/Symbol/CUSIP Number	Shares	Line 10a - Book Value	Line 10a - Column (b) Book Value	Line 10a - Column (c) Fair Market Value
1	FEDERAL HOME LOAN NOTE 2.625% DUE 05-20-11 (3133XQQQ8)	100,000	98,689	102,364	102,364
2	FEDERAL NATL MTG ASSN 4.37500% 09/15/2012 (31359MPF4)	125,000	129,116	133,868	133,868
3	FHL NOTE - 5.000% - 07/16/2013 (31339Y7K2)	200,000	194,453	218,352	218,352
4	FHLMC NOTE - 4.500% - 01/15/2015 (3134A4UX0)	75,000	73,845	80,595	80,595
5	FNMA 4.625% 10/15/14 (31359MWJ8)	100,000	102,484	108,344	108,344
6	FNMA 4.75% 12/15/10 (31359MZL0)	200,000	214,650	207,958	207,958
7	FNMA NOTE - 4.875% - 12/15/2016 (31359M2D4)	75,000	74,994	81,027	81,027
8	US T NOTE - 4.250% - 08/15/2015 (912828EE6)	100,000	95,963	107,063	107,063
9	US T NOTE - 4.875% - 05/31/2011 (912828FH8)	100,000	102,150	105,641	105,641
10	US T NOTES - 4.750% - 05/15/2014 (912828CJ7)	85,000	84,423	93,606	93,606
11	US T NTS - 4.1250% - 05/15/2015 (912828DV9)	100,000	103,416	106,641	106,641
12	US T NTS - 4.250% - 08/15/2014 (912828CT5)	100,000	94,603	107,906	107,906
13	US T NTS - 4.5000% - 09/30/2011 (912828FU9)	150,000	158,826	159,000	159,000
14	US T NTS SER E - 4.000% - 11/15/2020 (912828AP5)	60,000	57,628	64,097	64,097
15	US TIPS 2.000% 01/15/2014 (912828BW9)	146,002	148,564	154,672	154,672
16	US TIPS 2.000% 01/15/2016 (912828ET3)	136,192	135,228	143,822	143,822
17	US TIPS 2.500% 07/15/2016 (912828FL9)	160,597	160,630	174,887	174,887
18	US TIPS 3.000% 07/15/2012 (912828AF7)	36,011	35,311	38,779	38,779

**Form 990-PF, Part II, Line 10b - Investments: Corporate Stock**

		<b>TOTAL:</b>		6,934,386	6,257,725
	Description/Symbol/CUSIP Number	Shares	Line 10b - Column (b) Book Value	Line 10b - Column (c) Fair Market Value	
1	DODGE & COX FUNDS INTERNATIONAL STOCK FUND (DODFX)	15,807	587,636	503,445	
2	FIRST EAGLE SOGEN OVERSEAS FUND CLASS I (SGOIX)	28,120	692,922	554,523	
3	IPATH DJ AIGCITR ETN (DJP)	2,300	149,523	97,198	
4	ISHARES MSCI EMERGING MARKETS INDEX FD (EEM)	4,500	202,581	186,750	
5	ISHARES RUSSELL 1000 INDEX FD (IWB)	26,000	1,926,857	1,594,060	
6	ISHARES TRUST RUSSELL 1000 GROWTH INDEX FD (IWF)	8,800	490,424	438,680	
7	PIMCO ALL ASSET FUND INSTITUTIONAL CLASS (PAAIX)	98,345	1,212,517	1,129,986	
8	PIMCO DEVELOPING LOCAL MRKTS FD INSTL CL (PLMIX)	50,404	531,586	505,044	
9	SPDR S&P 500 ETF TRUST (SPY)	3,500	319,025	390,040	
10	SPDR S&P EMERGING ASIA PACIFIC ETF (GMF)	3,500	270,666	259,630	
11	TEMPLETON GLOBAL BOND FUND - CLASS A (TPINX)	47,042	550,649	598,369	

## Form 990-PF, Part II, Line 10c - Investments: Corporate Bonds

TOTAL:		1,328,167		1,388,874	
	Description/Symbol/CUSIP Number	Shares	Line 10c - Column (b) Book Value	Line 10c - Column (c) Fair Market Value	
1	ABBOTT LABS NT 4.350% 03/15/2014 (002824AQ3)	150,000	137,184	158,497	
2	AMERICAN EXPRESS CR CORP MTNBE 5.00000% 12/02/2010 (0258M0BY4)	100,000	102,149	102,700	
3	AMGEN INC - 4.850% - 11/18/2014 (031162AJ9)	10,000	10,051	10,768	
4	ASTRAZENECA - 5.400% - 06/01/2014 (046353AA6)	10,000	10,179	10,967	
5	AT&T NOTES 4.95% 1/15/13 (00206RAF9)	100,000	108,317	106,848	
6	BERKSHIRE HATHAWAY FIN CORP 5.0% 08/15/2013 (084664BG5)	100,000	105,025	107,223	
7	BHP BILLITON FINANCE USA 5.25% 12/15/2015 (055451AB4)	10,000	9,923	10,921	
8	CANADIAN NATL RR - 6.200% - 06/01/2036 (136375BN1)	5,000	4,983	5,421	
9	CATERPILLAR FIN - 4.625% - 06/01/2015 (14911RAJ8)	10,000	9,943	10,313	
10	CATERPILLAR FINL SVCS MTNS BE 4.70000% 03/15/2012 (14912L2R1)	50,000	52,689	52,695	
11	CISCO SYSTEMS INC 5% 2/22/16 (17275RAC6)	10,000	9,954	10,845	
12	CNST CONSENT, WYETH NT (AST165982)	15	0	17	
13	DEERE JOHN CAP CORP MTNS BE 4.875% 10/15/2010 FR (24422EPX1)	10,000	9,974	10,298	
14	DU PONT E I DE - 4.750% - 11/15/2012 (263534BK4)	100,000	94,993	107,667	
15	ENDURANCE SPEC - 6.150% - 10/15/2015 (29267HAB5)	5,000	4,982	5,280	
16	ERP OPERTING LP 05.375%, 8/1/2016 (26884AAU7)	10,000	9,547	9,790	
17	GENWORTH GLOBAL - 5.125% - 03/15/2011 (37247XAC6)	5,000	4,986	5,070	
18	GLAXOSMITHKLINE CAP INC GTD NT 4.375% 04/15/2014 (377372AA5)	100,000	106,644	105,321	
19	GNRL ELEC CAP CORP FDIC TLGP 3.00000% 12/09/2011 G (36967HAD9)	100,000	102,665	103,126	
20	GOLDMAN SACHS GROUP NT - 5.250% - 10/15/2013 (38141GDAQ4)	5,000	4,997	5,310	
21	HOME DEPOT INC 5.4% 03/01/16 (437076AP7)	10,000	9,951	10,347	
22	INTL LEASE FINANCE - 5.750% - 06/15/2011 (45974VA24)	5,000	4,994	4,575	
23	KRAFT FOODS NT - 5.625% - 11/01/2011 (50075NAB0)	10,000	10,685	10,525	
24	LOEWS CORP - 5.250% - 03/15/2016 (540424AN8)	5,000	4,841	5,073	
25	MERCK & CO INC 4.750. 01-MAR-2015 (589331AK3)	100,000	93,198	107,977	
26	MERRILL LYNCH CO INC MTN BE 4.250% 02/08/2010 FR (59018YUZ2)	10,000	9,972	10,032	
27	PROTECTIVE LIFE - 4.000% - 04/01/2011 (74367FAB4)	10,000	9,718	10,205	
28	REED ELSEVIER - 4.625% - 06/15/2012 (758202AD7)	10,000	9,989	10,333	
29	RESIDENTIAL CAPITAL CORP DTD 6/24/2005 6.375% 6/30/2010 (76113BAF6)	10,000	10,156	8,200	
30	SHELL INTL FIN - 5.625% - 06/27/2011 (822582AA0)	10,000	9,991	10,652	
31	TELECOM ITALIA FLT - 4.480% - 02/01/2011 (87927VAP3)	5,000	5,000	4,985	
32	TRANS-CANADA PIPELINES - 5.850% - 03/15/2036 (89352HAB5)	5,000	4,986	4,976	
33	UNITED TECHNOLOGY 4.875% NT. 05/01/15 (913017BH1)	10,000	9,944	10,811	
34	UNITED TECHNOLOGIES - 6.350% - 03/01/2011 (913017BD0)	100,000	103,378	105,987	
35	USB CAPITAL IX VAR (91731KAA8)	10,000	10,000	8,050	
36	VERIZON - 5.250% - 04/15/2013 (92343VAN4)	100,000	102,411	106,023	
37	WELLS FARGO - 5.1250% - 09/15/2016 (949746JE2)	10,000	9,459	10,188	
38	WYETH CR SENS 5.250% 03/15/2013 MAKE WHOLE (983024AA8)	10,000	10,309	10,858	

Form 990-PF, Part II, Line 13 - Investments - Other

TOTAL:			368,256	273,668
	Asset Description	Line 13 - Column (b) Book Value	Line 13 - Column (c) Fair Market Value	
1	ZF PARTNERS LP	368,256	273,668	
2				
3				
4				
5				
6				
7				
8				
9				
10				

## Form 990-PF, Part VIII, Line 1 - Compensation of Officers, Directors, Trustees and Foundation Managers

Form 990-ET, Part VIII, Line 1 - Compensation of Officers, Directors, Trustees and Generation-Skipping

TOTAL:										0	0	0
Name	Street	City	State	Zip Code	Title	Avg. Hrs.	Comp.	Benefits	Expense Account			
1 Janet Traub	720 Market Street Suite 900	San Francisco	CA	94102	President	3	0	0	0			
2 Jane Barnet	720 Market Street Suite 900	San Francisco	CA	94102	Secretary / Trustee	2	0	0	0			
3 Saretta Barnet	720 Market Street Suite 900	San Francisco	CA	94102	Trustee	2	0	0	0			
4 Howard J. Barnet, Jr.	720 Market Street Suite 900	San Francisco	CA	94102	Treasurer	1	0	0	0			
5 Barry Traub	720 Market Street Suite 900	San Francisco	CA	94102	Trustee	1	0	0	0			
6 Geoff Barnet	720 Market Street Suite 900	San Francisco	CA	94102	Trustee	1	0	0	0			
7 Jennifer Traub	720 Market Street Suite 900	San Francisco	CA	94102	Trustee	1	0	0	0			
8 Marjorie Traub	720 Market Street Suite 900	San Francisco	CA	94102	Trustee	1	0	0	0			
9 Nancy Chirinos	720 Market Street Suite 900	San Francisco	CA	94102	Trustee	1	0	0	0			
10 Peter Barnet	720 Market Street Suite 900	San Francisco	CA	94102	Trustee	1	0	0	0			



**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

GAY MENS HEALTH CRISIS INC

☐ Person ☒ Business**Street**

119 W 24TH ST

**City**

NEW YORK

**State**

NY

**Zip code**

10011

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

1,500

**Name**

GLIDE MEMORIAL UNITED METHODIST CHURCH

☐ Person ☒ Business**Street**

330 ELLIS ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94102

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Daily free meals program

**Amount**

5,000

**Name**

GLOBAL FUND FOR WOMEN INC

☐ Person ☒ Business**Street**

222 SUTTER ST STE 500

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94108

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

7,500

**Name**

GREEN CORPS INC

☐ Person ☒ Business**Street**

44 WINTER ST FL 4

**City**

BOSTON

**State**

MA

**Zip code**

02108

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

30,000

**Name**

GREENBELT ALLIANCE

☐ Person ☒ Business**Street**

631 HOWARD ST STE 510

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94105

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Last Landscapes Campaign

**Amount**

25,000

**Name**

HAIGHT ASHBURY FOOD PROGRAM

☐ Person ☒ Business**Street**

1525 WALLER ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94117

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

1,000

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

HARLEM CHILDRENS ZONE INC

☐ Person ☒ Business**Street**

35 E 125TH ST

**City**

NEW YORK

**State**

NY

**Zip code**

10035

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(2)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

30,000

**Name**

HEBREW FREE LOAN ASSOCIATION OF SAN FRANCISCO

☐ Person ☒ Business**Street**

131 STEUART ST STE 425

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94105

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

1,000

**Name**

HEIFER PROJECT INTERNATIONAL

☐ Person ☒ Business**Street**

1 WORLD AVE

**City**

LITTLE ROCK

**State**

AR

**Zip code**

72202

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Name**

HOMELESS PRENATAL PROGRAM INC

☐ Person ☒ Business**Street**

2500 18TH ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94110

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Name**

HOUSATONIC VALLEY ASSOCIATION INC

☐ Person ☒ Business**Street**

PO BOX 28

**City**

CORNWALL BRG

**State**

CT

**Zip code**

06754

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Water monitoring of the Shepaug River and the Litchfield Hills Greenprint Collaborative Project

**Amount**

25,000

**Name**

INTERNATIONAL FOUNDATION FOR ART RESEARCH INC

☐ Person ☒ Business**Street**

500 5TH AVE

**City**

NEW YORK

**State**

NY

**Zip code**

10110

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(2)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

INTERNATIONAL WOMENS HEALTH COALITION

☐ Person ☒ Business**Street**

333 7TH AVE

**City**

NEW YORK

**State**

NY

**Zip code**

10001

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

4,000

**Name**

JAMESTOWN COMMUNITY CENTER INC

☐ Person ☒ Business**Street**

3382 26TH ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94110

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

10,000

**Name**

JAMESTOWN COMMUNITY CENTER INC

☐ Person ☒ Business**Street**

3382 26TH ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94110

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Support to hire youth employees to provide summer programming

**Amount**

20,000

**Name**

JEWISH FAMILY &amp; CHILDRENS SERVICES

☐ Person ☒ Business**Street**

2150 POST ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94115

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General Operating Support

**Amount**

15,000

**Name**

JEWISH FAMILY &amp; CHILDRENS SERVICES OF THE EAST BAY

☐ Person ☒ Business**Street**

2484 SHATTUCK AVE

**City**

BERKELEY

**State**

CA

**Zip code**

94704

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

30,000

**Name**

LEE PESKY LEARNING CENTER INC

☐ Person ☒ Business**Street**

3324 ELDER ST

**City**

BOISE

**State**

ID

**Zip code**

83705

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

2,000

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

LEGAL SERVICES FOR CHILDREN INC

☐ Person ☒ Business**Street**

1254 MARKET ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94102

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Name**

MAD GARDENERS INC

☐ Person ☒ Business**Street**

PO BOX 146

**City**

SHERMAN

**State**

CT

**Zip code**

06784

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(2)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

500

**Name**

MANITOGA INC

☐ Person ☒ Business**Street**

22 OLD MANITOU RD

**City**

GARRISON

**State**

NY

**Zip code**

10524

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

30,000

**Name**

MARIN COMMUNITY FOOD BANK

☐ Person ☒ Business**Street**

75 DIGITAL DR

**City**

NOVATO

**State**

CA

**Zip code**

94949

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

2,500

**Name**

MEALS ON WHEELS OF SAN FRANCISCO INC

☐ Person ☒ Business**Street**

1375 FAIRFAX AVE

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94124

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

1,000

**Name**

MEMORIAL SLOAN-KETTERING CANCER CENTER

☐ Person ☒ Business**Street**

1233 YORK AVE

**City**

NEW YORK

**State**

NY

**Zip code**

10065

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Melanoma Research Division

**Amount**

2,500

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

MEMORIAL SLOAN-KETTERING CANCER CENTER

☐ Person ☒ Business**Street**

1233 YORK AVE

**City**

NEW YORK

**State**

NY

**Zip code**

10065

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Melanoma Vaccine Program

**Amount**

33,000

**Name**

MOAIC PROJECT

☐ Person ☒ Business**Street**

2223 WOOLSEY ST A

**City**

BERKELEY

**State**

CA

**Zip code**

94705

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(2)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Name**

NEW ISRAEL FUND

☐ Person ☒ Business**Street**

1101 14TH ST NW STE 600

**City**

WASHINGTON

**State**

DC

**Zip code**

20005

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Name**

NEW YORKERS FOR PARKS

☐ Person ☒ Business**Street**

355 LEXINGTON AVE FL 14

**City**

NEW YORK

**State**

NY

**Zip code**

10017

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

20,000

**Name**

OASIS FOR GIRLS

☐ Person ☒ Business**Street**

1129 FOLSOM ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94103

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Name**

OBERLIN COLLEGE

☐ Person ☒ Business**Street**

173 W LORAIN ST

**City**

OBERLIN

**State**

OH

**Zip code**

44074

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

2,000

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

PLANNED PARENTHOOD OF NEW YORK CITY INC

☐ Person ☒ Business**Street**

26 BLEECKER ST

**City**

NEW YORK

**State**

NY

**Zip code**

10012

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

2,500

**Name**

POMFRET SCHOOL INCORPORATED

☐ Person ☒ Business**Street**

PO BOX 128

**City**

POMFRET

**State**

CT

**Zip code**

06258

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Name**

PRESIDENT AND FELLOWS OF HARVARD COLLEGE

☐ Person ☒ Business**Street**

1350 MASSACHUSETTS AVE RM 480

**City**

CAMBRIDGE

**State**

MA

**Zip code**

02138

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Harvard Advocate Fund

**Amount**

3,750

**Name**

QUEENS THEATRE IN THE PARK INC

☐ Person ☒ Business**Street**

PO BOX 520069

**City**

FLUSHING

**State**

NY

**Zip code**

11352

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

15,000

**Name**

READING EXCELLENCE AND DISCOVERY FOUNDATION INC

☐ Person ☒ Business**Street**

80 MAIDEN LN 11TH FL

**City**

NEW YORK

**State**

NY

**Zip code**

10038

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Name**

RINGSIDE INC

☐ Person ☒ Business**Street**

51 N 1ST ST

**City**

NEW YORK

**State**

NY

**Zip code**

11211

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Teen Action Club

**Amount**

15,000

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

ROSE FOUNDATION FOR COMMUNITIES AND THE ENVIRONMENT

☐ Person ☒ Business**Street**

6008 COLLEGE AVE APT 10

**City**

OAKLAND

**State**

CA

**Zip code**

94618

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Environmental Grassroots Fund

**Amount**

20,000

**Name**

SAN FRANCISCO CHILD ABUSE PREVENTION CENTER

☐ Person ☒ Business**Street**

1757 WALLER ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94117

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

60,000

**Name**

SAN FRANCISCO FOOD BANK

☐ Person ☒ Business**Street**

900 PENNSYLVANIA AVE

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94107

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

10,000

**Name**

SCHOLARSHIP &amp; WELFARE FUNDS OF ALUMNI ASSO OF HUNTER COLLE

☐ Person ☒ Business**Street**

695 PARK AVE RM 1314HE

**City**

NEW YORK

**State**

NY

**Zip code**

10065

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Miriam and David L. Klein Scholarship Fund

**Amount**

5,000

**Name**

ST ANTHONY FOUNDATION

☐ Person ☒ Business**Street**

121 GOLDEN GATE AVE FL2

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94102

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General support to meet the increased needs of San Franciscans, especially families

**Amount**

15,000

**Name**

STANFORD UNIVERSITY

☐ Person ☒ Business**Street**

DEVELOPMENT OFC, ARRILLAGA ALUMNI CTR

**City**

PALO ALTO

**State**

CA

**Zip code**

94305

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Stanford Fund and for the Classics

**Amount**

2,500

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

STEEP ROCK ASSOCIATION INC

☐ Person ☒ Business**Street**

PO BOX 279

**City**

WASHINGTON

**State**

CT

**Zip code**

06794

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(2)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

5,000

**Name**

TEAM UP FOR YOUTH

☐ Person ☒ Business**Street**

310 8TH ST STE 300

**City**

OAKLAND

**State**

CA

**Zip code**

94607

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Team Up for Girls San Francisco

**Amount**

10,000

**Name**

THE JUDAH L MAGNES MUSEUM

☐ Person ☒ Business**Street**

2911 RUSSELL ST

**City**

BERKELEY

**State**

CA

**Zip code**

94705

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(2)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

1,000

**Name**

THE NEW YORK PUBLIC LIBRARY ASTOR LENOX AND TILDEN FOUNDATIO

☐ Person ☒ Business**Street**

5TH AVE AND 42ND ST

**City**

NEW YORK

**State**

NY

**Zip code**

10018

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Local Libraries Program

**Amount**

5,000

**Name**

THE SNAKE RIVER ALLIANCE EDUCATION FUND INC

☐ Person ☒ Business**Street**

PO BOX 1731

**City**

BOISE

**State**

ID

**Zip code**

83701

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

2,000

**Name**

THE TAYLOR FAMILY FOUNDATION

☐ Person ☒ Business**Street**

5555 ARROYO RD

**City**

LIVERMORE

**State**

CA

**Zip code**

94550

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

2,000



**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

THE WHARTON SCHOOL

☐ Person ☒ Business**Street**

3733 SPRUCE ST, 344 VANCE HALL

**City**

PHILADELPHIA

**State**

PA

**Zip code**

19104

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

2,500

**Name**

TIDES CENTER

☐ Person ☒ Business**Street**

PRESIDIO BLDG 1014

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94129

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General support FBO Women's Community Clinic

**Amount**

25,000

**Name**

TOWN SCHOOL INC

☐ Person ☒ Business**Street**

540 E 76TH ST

**City**

NEW YORK

**State**

NY

**Zip code**

10021

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

22,500

**Name**

TRUSTEES OF COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK

☐ Person ☒ Business**Street**

475 RIVERSIDE DR, MC7724

**City**

NEW YORK

**State**

NY

**Zip code**

10115

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Law School Program

**Amount**

5,000

**Name**

US FOUNDATION FOR THE INSPIRATION &amp; RECOGNITION SCIENCE &amp; TECI

☐ Person ☒ Business**Street**

200 BEDFORD ST

**City**

MANCHESTER

**State**

NH

**Zip code**

03101

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

FIRST Lego tournaments for middle school students in New York City

**Amount**

10,000

**Name**

VISITING NURSE SERVICE OF NEW YORK

☐ Person ☒ Business**Street**

5 PENN PLZ 12 FL GENL ACCTG

**City**

NEW YORK

**State**

NY

**Zip code**

10001

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(3)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

25,000

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Recipient(s) paid during the year

**Name**

WOMENS HOUSING AND ECONOMIC DEVELOPMENT CORPORATION

☐ Person ☒ Business**Street**

50 E 168TH ST

**City**

BRONX

**State**

NY

**Zip code**

10452

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Family Day Care Microenterprise Program

**Amount**

27,500

**Name**

WOMENS INITIATIVE FOR SELF EMPLOYMENT

☐ Person ☒ Business**Street**

1398 VALENCIA ST

**City**

SAN FRANCISCO

**State**

CA

**Zip code**

94110

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

General &amp; Unrestricted

**Amount**

25,000

**Name**

YOUNG MENS &amp; YOUNG WOMENS HEBREW ASSOCIATION

☐ Person ☒ Business**Street**

1395 LEXINGTON AVE

**City**

NEW YORK

**State**

NY

**Zip code**

10128

**Foreign Country****Relationship**

N/A

**Foundation Status**

509(a)(1)

**Purpose of grant/contribution**

Support for the Musical Introductions Series and the School Partnership Program

**Amount**

20,000

**Name**☐ Person ☐ Business**Street****City****State****Zip code****Foreign Country****Relationship****Foundation Status****Purpose of grant/contribution****Amount**

0

**Name**☐ Person ☐ Business**Street****City****State****Zip code****Foreign Country****Relationship****Foundation Status****Purpose of grant/contribution****Amount**

0

**Name**☐ Person ☐ Business**Street****City****State****Zip code****Foreign Country****Relationship****Foundation Status****Purpose of grant/contribution****Amount**

0