



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2009

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 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 change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation CRESCENT PORTER HALE FOUNDATION		A Employer identification number 94-6093385
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number (415) 388-2333
	City or town, state, and ZIP code MILL VALLEY, CA 94941		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 ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 48,526,437. (Part I, column (d) must be on cash basis)			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____			

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		991,777.	992,631.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		32,295.			
b Gross sales price for all assets on line 6a		32,295.			
7 Capital gain net income (from Part IV, line 2)			32,295.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		9,332,619.	2,775,816.		STATEMENT 2
12 Total. Add lines 1 through 11		10,356,691.	3,800,742.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		25,685.	13,892.		13,892.
c Other professional fees STMT 4		210,900.	10,545.		200,355.
17 Interest					
18 Taxes STMT 5		45,215.	7,687.		0.
19 Depreciation and depletion		595.	0.		
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		25,442.	15,855.		10,620.
24 Total operating and administrative expenses Add lines 13 through 23		307,837.	47,979.		224,867.
25 Contributions, gifts, grants paid		1,937,000.			1,982,000.
26 Total expenses and disbursements. Add lines 24 and 25		2,244,837.	47,979.		2,206,867.
27 Subtract line 26 from line 12		8,111,854.			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			3,752,763.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	2.		
	2 Savings and temporary cash investments	1,798,976.	2,296,629.	2,296,629.
	3 Accounts receivable ▶ 395,987.			
	Less: allowance for doubtful accounts ▶	354,633.	395,987.	395,987.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations STMT 7	1,274,027.	1,460,770.	1,460,770.
	b Investments - corporate stock STMT 8	15,995,603.	22,776,119.	22,776,119.
	c Investments - corporate bonds STMT 9	16,198,289.	16,827,535.	16,827,535.
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 10	4,751,100.	4,751,100.	4,751,100.
	14 Land, buildings, and equipment basis ▶ 14,362.			
	Less: accumulated depreciation STMT 11 ▶ 13,697.	760.	665.	665.
	15 Other assets (describe ▶ STATEMENT 12)	41,748.	17,632.	17,632.
	16 Total assets (to be completed by all filers)	40,415,138.	48,526,437.	48,526,437.
	17 Accounts payable and accrued expenses	16,089.	12,300.	
	18 Grants payable	215,000.	170,000.	
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 13)	0.	48,234.	
	23 Total liabilities (add lines 17 through 22)	231,089.	230,534.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	40,184,049.	48,295,903.	
28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	0.	0.		
30 Total net assets or fund balances	40,184,049.	48,295,903.		
31 Total liabilities and net assets/fund balances	40,415,138.	48,526,437.		

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	40,184,049.
2 Enter amount from Part I, line 27a	2	8,111,854.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	48,295,903.
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	48,295,903.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a CAPITAL GAINS DIVIDENDS				
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 32,295.			32,295.	
b				
c				
d				
e				
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))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a			32,295.	
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)		If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 2 32,295.		
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) If (loss), enter -0- in Part I, line 8		3 N/A		

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	2,462,488.	48,287,258.	.050997
2007	2,480,098.	50,249,404.	.049356
2006	1,946,166.	40,614,017.	.047919
2005	1,830,569.	35,900,634.	.050990
2004	1,519,671.	33,562,569.	.045279

2 Total of line 1, column (d)	2	.244541
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.048908
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	42,137,111.
5 Multiply line 4 by line 3	5	2,060,842.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	37,528.
7 Add lines 5 and 6	7	2,098,370.
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	8	2,206,867.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	37,528.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		3	37,528.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
3 Add lines 1 and 2		5	37,528.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 55,160.		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c 5,000.		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d		7	60,160.
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	22,632.
11 Enter the amount of line 10 to be Credited to 2010 estimated tax ☒ 22,632. Refunded ☐		11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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
1c Did the foundation file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☒ \$ 0. (2) On foundation managers ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0.		
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
4a 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?		
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ CA		
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 2009 or the taxable year beginning in 2009 (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

N/A

Form 990-PF (2009)

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 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 ► WWW.CRESCENTPORTERHALE.ORG	13	X	
14	The books are in care of ► ULLA DAVIS, CRESCENT PORTER HALE FO Telephone no ► (415) 388-2333 Located at ► 655 REDWOOD HWY, SUITE 301, MILL VALLEY, CA ZIP+4 ► 94941			
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		N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		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?		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?	☐ Yes ☒ No	
If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	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		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 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)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

Form 990-PF (2009)

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)?

☐ 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)?

N/A

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?

N/A

☐ 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

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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?

N/A

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.

(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 STATEMENT 14		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

0

Form 990-PF (2009)

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
ULLA Z. DAVIS - 655 REDWOOD HIGHWAY, SUITE 301, MILL VALLEY, CA 94941	MANAGEMENT & ADMIN OF GRANT PROCESS	210,900.
Total number of others receiving over \$50,000 for professional services		0

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 DISTRIBUTING GRANTS TO SAN FRANCISCO BAY AREA ORGANIZATIONS OPERATED EXCLUSIVELY FOR RELIGIOUS, CHARITABLE, SCIENTIFIC, LITERARY, EDUCATIONAL, OR COMMUNITY CHEST PURPOSES.	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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	0.

Form 990-PF (2009)

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	36,112,822.
b	Average of monthly cash balances	1b	1,914,184.
c	Fair market value of all other assets	1c	4,751,787.
d	Total (add lines 1a, b, and c)	1d	42,778,793.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	42,778,793.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	641,682.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	42,137,111.
6	Minimum investment return. Enter 5% of line 5	6	2,106,856.

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	2,106,856.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	37,528.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	37,528.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,069,328.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,069,328.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,069,328.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	2,206,867.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,206,867.
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	5	37,528.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,169,339.

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.

Form 990-PF (2009)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				2,069,328.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			817,168.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 2,206,867.				
a Applied to 2008, but not more than line 2a			817,168.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				1,389,699.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				679,629.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling


☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Prior 3 years				(e) Total
	Tax year (a) 2009	(b) 2008	(c) 2007	(d) 2006	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities					
Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

SEE STATEMENT 15

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

c Any submission deadlines

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
a Paid during the year SEE ATTACHMENT A				
Total			3a	0.
b Approved for future payment				
Total SEE STATEMENT 16			3b	95,000.

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

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

[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.

Sign Here

Signature of officer or trustee _____ Date 8/16/10 Title DIRECTOR

Paid Preparer's Use Only	Preparer's signature KATHLEEN W. WILLIAMS	Date 8/3/10	Check if self-employed ☐	Preparer's identifying number
	Firm's name (or yours if self-employed), address, and ZIP code HARB, LEVY, & WEILAND, LLP ONE MARKET, LANDMARK, SUITE 620 SAN FRANCISCO, CA 94105	EIN	Phone no 4159746000	

Form 990-PF (2009)

2009 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	FAX MACHINE	010593	200DB	5.00	17	646.			646.	646.		0.
2	COMPUTER EQUIPMENT	030193	200DB	5.00	17	5,000.			5,000.	5,000.		0.
4	COMPUTER EQUIPMENT	060195	200DB	5.00	17	3,000.			3,000.	3,000.		0.
5	COPIER	121603	200DB	5.00	17	3,846.			3,846.	3,845.		0.
6	COMPUTER EQUIPMENT	120507	200DB	5.00	17	1,139.			1,139.	490.		260.
7	SOFTWARE	120507		36M	43	173.			173.	63.		58.
8	COMPUTER EQUIPMENT	042209	200DB	5.00	19B	558.		279.	279.			335.
	* TOTAL 990-PF PG 1					14,362.		279.	14,083.	13,044.	0.	653.
	DEPR & AMORT											

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
-------------	--	-----------	---

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CHARLES SCHWAB	1,023,536.	32,295.	991,241.
NORTHERN TRUST BANK	536.	0.	536.
TOTAL TO FM 990-PF, PART I, LN 4	1,024,072.	32,295.	991,777.

FORM 990-PF	OTHER INCOME	STATEMENT	2
-------------	--------------	-----------	---

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ROYALTIES-OIL & GAS LEASES	2,775,816.	2,775,816.	
ROYALTIES-OIL & GAS LEASES ACCRUAL ADJ	42,208.	0.	
CHANGE IN UNREALIZED APPRECIATION OF SECURITIES	6,514,595.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	9,332,619.	2,775,816.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	3
-------------	-----------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	25,685.	13,892.		13,892.
TO FORM 990-PF, PG 1, LN 16B	25,685.	13,892.		13,892.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXECUTIVE DIRECTOR'S FEES	210,900.	10,545.		200,355.
TO FORM 990-PF, PG 1, LN 16C	210,900.	10,545.		200,355.

FORM 990-PF

TAXES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	37,528.	0.		0.
FOREIGN TAXES PAID	7,687.	7,687.		0.
TO FORM 990-PF, PG 1, LN 18	45,215.	7,687.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES	4,725.	0.		4,725.
MISCELLANEOUS EXPENSES	992.	0.		992.
BOARD MEETING	3,212.	0.		4,303.
STATE FILING FEES	600.	0.		600.
INVESTMENT APPRAISAL	15,855.	15,855.		0.
AMORTIZATION	58.	0.		0.
TO FORM 990-PF, PG 1, LN 23	25,442.	15,855.		10,620.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	7
-------------	--	-----------	---

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME-CHARLES SCHWAB	X		1,460,770.	1,460,770.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,460,770.	1,460,770.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,460,770.	1,460,770.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SECURITIES-CHARLES SCHWAB	20,266,172.	20,266,172.
OTHER EQUITY FUNDS	2,509,947.	2,509,947.
TOTAL TO FORM 990-PF, PART II, LINE 10B	22,776,119.	22,776,119.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BOND FUNDS-CHARLES SCHWAB	16,827,535.	16,827,535.
TOTAL TO FORM 990-PF, PART II, LINE 10C	16,827,535.	16,827,535.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
-------------	-------------------	-----------	----

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OIL & GAS INVESTMENTS	COST	4,751,100.	4,751,100.
TOTAL TO FORM 990-PF, PART II, LINE 13		4,751,100.	4,751,100.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 11

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FAX MACHINE	646.	646.	0.
COMPUTER EQUIPMENT	5,000.	5,000.	0.
COMPUTER EQUIPMENT	3,000.	3,000.	0.
COPIER	3,846.	3,845.	1.
COMPUTER EQUIPMENT	1,139.	750.	389.
SOFTWARE	173.	121.	52.
COMPUTER EQUIPMENT	558.	335.	223.
TOTAL TO FM 990-PF, PART II, LN 14	14,362.	13,697.	665.

FORM 990-PF OTHER ASSETS STATEMENT 12

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
PREPAID TAXES	23,922.	17,632.	17,632.
DEFERRED TAX ASSET	17,826.	0.	0.
TO FORM 990-PF, PART II, LINE 15	41,748.	17,632.	17,632.

FORM 990-PF OTHER LIABILITIES STATEMENT 13

DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFERRED TAXES PAYABLE	0.	48,234.
TOTAL TO FORM 990-PF, PART II, LINE 22	0.	48,234.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 14

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN	EXPENSE CONTRIB ACCOUNT
L.E. ALFORD 47-057 KASBAH DR PALM DESERT, CA 92260	0.00	0.	0.	0.
THOMAS J. MELLON, JR. 450 LIBERTY ST. SAN FRANCISCO, CA 94114	0.00	0.	0.	0.
A.L. BALLARD BALLARD EXPLORATION CO., 1021 MAIN ST. #2310 HOUSTON, TX 77002	PRESIDENT 1.00	0.	0.	0.
EUGENE E. BLECK, M.D. 5 LAURELDALE RD. HILLSBOROUGH, CA 94010	0.00	0.	0.	0.
EPHRAIM P. ENGLEMAN, M.D. UC MEDICAL CENTER, 350 PARNASSUS AVE, STE 600 SAN FRANCISCO, CA 94143	0.00	0.	0.	0.
NICHOLAS M. GRAVES OSTERWEIS CAPITAL MGMT, ONE MARITIME PLAZA, STE. 800 SAN FRANCISCO, CA 94111	0.00	0.	0.	0.
E. WILLIAM SWANSON 518 MEADOWOOD LANE. ST HELENA, CA 94574	VICE PRESIDENT 1.00	0.	0.	0.
JOAN WITHERS DINNER P.O. BOX 1340 KENWOOD, CA 95452	0.00	0.	0.	0.
SISTER ESTELA MORALES 100 MASONIC AVENUE SAN FRANCISCO, CA 94118	M.S.W. 1.00	0.	0.	0.
ROBERT S. KELLING, JR. 596 GRIZZLY PEAK BLVD. BERKELEY, CA 94708	SECRETARY/TREASURER 5.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 15

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CRESCENT PORTER HALE FOUNDATION

TELEPHONE NUMBERFORM AND CONTENT OF APPLICATIONSLETTER OF INTENT, INDICATING THE NATURE OF THE PROGRAM AND THE SPECIFIC
PURPOSES FOR WHICH FUNDING IS SOUGHT.ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDSNONE, HOWEVER, ORGANIZATIONS IN THE SAN FRANCISCO BAY AREA WILL BE GIVEN
PREFERENCE.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
APPROVED FOR FUTURE PAYMENT

STATEMENT 16

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
BOYS & GIRLS CLUBS OF THE PENINSULA MENLO PARK, CA	COMMUNITY	501(C)(3)	15,000.
ARCHBISHOP RIORDAN HIGH SCHOOL SAN FRANCISCO, CA	COMMUNITY	501(C)(3)	20,000.
ST. ELIZABETH SETON CATHOLIC SCHOOL PALO ALTO, CA	COMMUNITY	501(C)(3)	30,000.
DE MARILLAC ACADEMY SAN FRANCISCO, CA	COMMUNITY	501(C)(3)	30,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3B

95,000.

Depreciation and Amortization 990-PF
(Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

CRESCENT PORTER HALE FOUNDATION

FORM 990-PF PAGE 1

94-6093385

Part I Election To Expense Certain Property Under Section 179 Note: If you have any listed property, complete Part V before you complete Part I

1	Maximum amount. See the instructions for a higher limit for certain businesses	1	250,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	800,000.
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2008 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2010. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	279.
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2009	17	260.
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B - Assets Placed in Service During 2009 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property		279.	5 YRS.	HY	200DB	56.
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property	/		27.5 yrs.	MM	S/L	
	/		27.5 yrs.	MM	S/L	
i Nonresidential real property	/		39 yrs.	MM	S/L	
	/			MM	S/L	

Section C - Assets Placed in Service During 2009 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year	/		40 yrs	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr.	22	595.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V Listed Property (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement.)**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.**Section A - Depreciation and Other Information** (Caution: See the instructions for limits for passenger automobiles)**24a** Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No **24b** If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
--	-------------------------------------	--	-------------------------------	--	---------------------------	------------------------------	----------------------------------	---------------------------------------

25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use

25

26 Property used more than 50% in a qualified business use:

		%						
		%						
		%						

27 Property used 50% or less in a qualified business use:

		%			S/L -		
		%			S/L -		
		%			S/L -		

28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1

28

29 Add amounts in column (i), line 26. Enter here and on line 7, page 1

29

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person.

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle		(b) Vehicle		(c) Vehicle		(d) Vehicle		(e) Vehicle		(f) Vehicle	
30 Total business/investment miles driven during the year (do not include commuting miles)												
31 Total commuting miles driven during the year												
32 Total other personal (noncommuting) miles driven												
33 Total miles driven during the year. Add lines 30 through 32												
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use?												

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use?		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.**Part VI Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
-----------------------------	------------------------------------	------------------------------	------------------------	---	--------------------------------------

42 Amortization of costs that begins during your 2009 tax year:

43 Amortization of costs that began before your 2009 tax year

43

58.

44 Total. Add amounts in column (f). See the instructions for where to report

44

58.

Crescent Porter Hale Foundation Grants Paid

January through December 2008

Name	Address	Status	Paid Amount
826 Valencia	San Francisco, CA	Public Charity	5,000 00
A Home Away from Homelessness	San Francisco, CA	Public Charity	12,000 00
ACT	San Francisco, CA	Public Charity	10,000 00
Alameda Co Community Food Bank	Oakland, CA	Public Charity	25,000 00
Alameda Point Collaborative	Alameda, CA	Public Charity	12,500 00
Alliance of Mission Dist Cath Schools	San Francisco, CA	Public Charity	60,000 00
Alternatives in Action	Alameda, CA	Public Charity	15,000 00
Archbishop Riordan High School	San Francisco, CA	Public Charity	20,000 00
Asian Neighborhood Design	San Francisco, CA	Public Charity	15,000 00
ATU	Russellville, Arkansas	Public Charity	5,250 00
Bay Area Comm Resources	San Rafael, CA	Public Charity	5,000 00
Bay Area Outreach & Recreation Program	Berkeley, CA	Public Charity	10,000 00
Bay Area Video Coalition	San Francisco, CA	Public Charity	8,000 00
Berkeley Repertory Theater	Berkeley, CA	Public Charity	3,000 00
Berkeley-Albany YMCA	Berkeley, CA	Public Charity	25,000 00
Bernal Heights Neighborhood Center	San Francisco, CA	Public Charity	10,000 00
Best Friends Animal Society	Kanab, UT	Public Charity	1,000 00
Boys & Girls Club - Peninsula	Menlo Park, CA	Public Charity	15,000 00
Boys & Girls Club of Oakland	Oakland, CA	Public Charity	15,000 00
Boys and Girls Club of Marin	San Rafael, CA	Public Charity	12,000 00
Boys and Girls Club of San Leandro	San Leandro, CA	Public Charity	12,000 00
Bridge the Gap	San Anselmo, CA	Public Charity	5,000 00
C E O Women	Oakland, CA	Public Charity	15,000 00
CA Consortium of Education Foundations	Palo Alto, CA	Public Charity	1,000 00
Calistoga Family Center	Calistoga, CA	Public Charity	3,000 00
Canal Alliance	San Rafael, CA	Public Charity	15,000 00
Central Asia Institute	Bozeman, MT	Public Charity	1,000 00
Central YMCA	San Francisco, CA	Public Charity	15,000 00
Community Housing Partnership	San Francisco, CA	Public Charity	10,000 00
Compass Community Services	San Francisco, CA	Public Charity	15,000 00
Congregations Organizing for Renewal	Hayward, CA	Public Charity	20,000 00
Contra Costa Interfaith Housing	Lafayette, CA	Public Charity	15,000 00
CORA	San Mateo, CA	Public Charity	15,000 00

Crescent Porter Hale Foundation Grants Paid

January through December 2008

De Marillac Academy	San Francisco, CA	Public Charity	15,000 00
Destinay Arts Center	Oakland, CA	Public Charity	10,000 00
Dorothy Day House	Berkeley, CA	Public Charity	10,000 00
Drawbridge	San Rafael, CA	Public Charity	15,000 00
Duke School	Durham, NC	Public Charity	3,000 00
Each One Reach One	So San Francisco, CA	Public Charity	10,000 00
East Bay Agency for Children	Oakland, CA	Public Charity	15,000 00
Edgewood Center for Children & Families	San Francisco, CA	Public Charity	10,000 00
Eldergivers	San Francisco, CA	Public Charity	5,000 00
Episcopal Community Services of SF	San Francisco, CA	Public Charity	15,000 00
Exploratorium	San Francisco, CA	Public Charity	10,000 00
FACE	Oakland, CA	Public Charity	300,000 00
Faith Network of the East Bay, Inc	Oakland, CA	Public Charity	10,000 00
Family House	San Francisco, CA	Public Charity	15,000 00
Fine Arts Museum of San Francisco	San Francisco, CA	Public Charity	10,000 00
Food Bank of Contra Costa & Solano	Concord, CA	Public Charity	15,000 00
Foundation Center of San Francisco	San Francisco, CA	Public Charity	3,000 00
Friends for Youth	Redwood City, CA	Public Charity	15,000 00
Friends of Ballard Park	Newport, RI	Public Charity	10,000 00
Friends of the Urban Forest	San Francisco, CA	Public Charity	7,000 00
Girls Inc of Alameda County	San Leandro, CA	Public Charity	15,000 00
Glide Foundation	San Francisco, CA	Public Charity	7,500 00
Good Shepherd Gracenter	San Francisco, CA	Public Charity	10,000 00
Goodwill Industries of Greater East Bay	Oakland, CA	Public Charity	12,000 00
Gregorian University	New York, NY	Public Charity	7,500 00
Hamilton Family Center	San Francisco, CA	Public Charity	20,000 00
Heifer Foundation International	New York, NY	Public Charity	1,000 00
Heifer Foundation International	New York, NY	Public Charity	1,000 00
Heifer Foundation International	New York, NY	Public Charity	2,000 00
Homeward Bound of Marin	Novato, CA	Public Charity	50,000 00
Institute on Aging	San Francisco, CA	Public Charity	25,000 00
Jamestown Community Center	San Francisco, CA	Public Charity	10,000 00
Jeanne Clover Animal Foundation	Salinas, CA	Public Charity	2,000 00
Jeanne Clover Animal Foundation	Salinas, CA	Public Charity	1,000 00
Jesuit Volunteer Corps	Santa Clara, CA	Public Charity	7,500 00

Crescent Porter Hale Foundation

Grants Paid

January through December 2008

05/15/09
J Jacobs

Junior League of Oakland-East Bay	Lafayette, CA	Public Charity	15,000.00
Junipero Serra High School	San Francisco, CA	Public Charity	1,250.00
Kala Art Institute	Berkeley, CA	Public Charity	6,000.00
Kenwood Education Foundation	Kenwood, CA	Public Charity	250.00
Kenwood Education Foundation	Kenwood, CA	Public Charity	2,500.00
Kids' Turn	San Francisco, CA	Public Charity	10,000.00
Life Eldercare Inc	Fremont, CA	Public Charity	15,000.00
Little Sisters of the Poor	San Francisco, CA	Public Charity	7,500.00
Loaves & Fishes of Contra Costa Co	Danville, CA	Public Charity	15,000.00
Love-A-Child Missions	Bay Point, CA	Public Charity	10,000.00
Luna Kids Dance	Berkeley, CA	Public Charity	10,000.00
Marrn Abused Women's Services	San Rafael, CA	Public Charity	12,000.00
Marrn Advocates for Children	San Rafael, CA	Public Charity	10,000.00
Marrn County School Volunteers	San Rafael, CA	Public Charity	10,000.00
Marrn Services for Women	San Rafael, CA	Public Charity	10,000.00
Marquette University	Milwaukee, WI	Public Charity	1,250.00
Mercy High School	San Francisco, CA	Public Charity	12,500.00
Mercy High School	San Francisco, CA	Public Charity	12,500.00
Mercy Retirement & Care Center	Oakland, CA	Public Charity	10,000.00
Merola Opera	San Francisco, CA	Public Charity	5,000.00
Mid-Peninsula Boys and Girls Club	San Mateo, CA	Public Charity	15,000.00
Mission Learning Center	San Francisco, CA	Public Charity	12,000.00
New Conservatory Theatre Ctr	San Francisco, CA	Public Charity	7,500.00
Next Step Learning Center	Oakland, CA	Public Charity	10,000.00
Oakland Based Urban Gardens	Oakland, CA	Public Charity	15,000.00
PAWS	Napa, CA	Public Charity	1,000.00
PAWS	Napa, CA	Public Charity	1,000.00
Peninsula Girls Chorus	Burlingame, CA	Public Charity	5,000.00
PICO	Oakland, CA	Public Charity	15,000.00
PICO	Oakland, CA	Public Charity	5,000.00
Piedmont Choirs	Piedmont, CA	Public Charity	12,000.00
Prescott-Joseph Ctr for Comm Enhancement	Oakland, CA	Public Charity	10,000.00
Ragazzi Boys Choir	San Mateo, CA	Public Charity	5,000.00
Reading Partners	Milpitas & Oakland, CA	Public Charity	15,000.00
Rock - Real Options for City Kids	San Francisco, CA	Public Charity	12,000.00

Grants Paid

January through December 2008

Ronald McDonald House	San Francisco, CA	Public Charity	5,000 00
Rubicon Programs Incorporated	Richmond, CA	Public Charity	20,000 00
Salvation Army	San Francisco, CA	Public Charity	7,500 00
San Domenico School	Swanson	Public Charity	2,000 00
San Francisco Ballet	San Francisco, CA	Public Charity	5,000 00
San Francisco Conservatory of Music	San Francisco, CA	Public Charity	7,500 00
San Francisco Educational Fund	San Francisco, CA	Public Charity	16,000 00
San Francisco Food Bank	San Francisco, CA	Public Charity	7,500 00
San Francisco Mime Troupe	San Francisco, CA	Public Charity	5,000 00
San Francisco Shakespeare Festival	San Francisco, CA	Public Charity	15,000 00
San Francisco Symphony	San Francisco, CA	Public Charity	5,000 00
Sanchez Art Center	Pacifica, CA	Public Charity	5,000 00
Scholarship Chicago	Chicago, IL	Public Charity	2,000 00
Stike Counseling Center	So San Francisco, CA	Public Charity	5,000 00
SPARK	San Francisco, CA	Public Charity	20,000 00
St Anthony's Dining Room	San Francisco, CA	Public Charity	7,500 00
St Elizabeth Seton Catholic School	Palo Alto, CA	Public Charity	15,000 00
St Francis of Assisi Youth Club	Palo Alto, CA	Public Charity	8,000 00
St Helena Family Resource Center	St Helena, CA	Public Charity	5,000 00
St Helena Family Resource Center	St Helena, CA	Public Charity	1,000 00
St Helena Family Resource Center	St Helena, CA	Public Charity	2,000 00
St Paul of the Shipwreck Catholic Comm	San Francisco, CA	Public Charity	10,000 00
Stagebridge	Oakland, CA	Public Charity	15,000 00
Stride Center	San Pablo, CA	Public Charity	15,000 00
Summer Search	San Francisco, CA	Public Charity	25,000 00
Sunset Youth Services	San Francisco, CA	Public Charity	12,000 00
T O T A	Oakland, CA	Public Charity	5,000 00
Tenderloin Neighborhood Devel Corp	San Francisco, CA	Public Charity	20,000 00
The BASIC Fund	San Francisco, CA	Public Charity	240,000 00
The Green Scholarship Program	Stafford, TX	Public Charity	3,000 00
Valley of the Moon Childrens Foundation	Santa Rosa, CA	Public Charity	1,000 00
West Marin Community Services	Point Reyes Station, CA	Public Charity	7,500 00
West Marin Senior Services	Point Reyes Station, CA	Public Charity	5,000 00
Women's Opportunity Int'l	San Francisco, CA	Public Charity	5,000 00
Women's Opportunity Int'l	San Francisco, CA	Public Charity	5,000 00

Crescent Porter Hale Foundation
Grants Paid
January through December 2008

Youth Community Services	Palo Alto, CA	Public Charity	15,000 00
Youth in Arts	San Rafael, CA	Public Charity	8,000 00
YWCA San Francisco and Marin	San Francisco, CA	Public Charity	8,000 00
			<u>1,982,000 00</u>