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Form 990-PF

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

OMB No 1545-0052

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 01-01-2009 , and ending 12-31-2009

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 LOWELL BERRY FOUNDATION		A Employer identification number 94-6108391
	Number and street (or P O box number if mail is not delivered to street address) 3685 Mt Diablo Blvd	Room/suite	B Telephone number (see page 10 of the instructions) (925) 284-4427
	City or town, state, and ZIP code Lafayette, CA 94549		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 23,099,898

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	94	94	94	
	4 Dividends and interest from securities.	698,620	698,620	698,620	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-281,171			
	b Gross sales price for all assets on line 6a _____ 4,970,407				
	7 Capital gain net income (from Part IV , line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	417,543	698,714	698,714	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages	37,075	1,854		35,221
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	24,051	1,203		22,848
	c Other professional fees (attach schedule)	950	48		902
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	19,297	2,521		2,959
	19 Depreciation (attach schedule) and depletion . . .	1,216			
	20 Occupancy	33,357	1,668		31,869
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	10,986	548	15	10,423
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	126,932	7,842	15	104,222
	25 Contributions, gifts, grants paid	1,093,833			1,093,833
	26 Total expenses and disbursements. Add lines 24 and 25	1,220,765	7,842	15	1,198,055
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-803,222			
	b Net investment income (if negative, enter -0-)		690,872		
	c Adjusted net income (if negative, enter -0-)			698,699	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	50	50	50
	2	Savings and temporary cash investments	783,509	617,770	617,770
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	17,957	10,183	10,183
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	18,723,353	22,467,970	22,467,970
	14	Land, buildings, and equipment basis ▶ _____ 64,316 Less accumulated depreciation (attach schedule) ▶ _____ 60,391	5,141	3,925	3,925
Liabilities	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	19,530,010	23,099,898	23,099,898
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
Net Assets or Fund Balances	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)	1,452	1,672	
	23	Total liabilities (add lines 17 through 22)	1,452	1,672	
		Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	19,528,558	23,098,226	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	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			
	30	Total net assets or fund balances (see page 17 of the instructions)	19,528,558	23,098,226	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	19,530,010	23,099,898	

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	19,528,558
2	Enter amount from Part I, line 27a	2	-803,222
3	Other increases not included in line 2 (itemize) ▶ _____	3	4,372,890
4	Add lines 1, 2, and 3	4	23,098,226
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	23,098,226

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)
1 a	Vanguard Group 2009 STCG dividends	P	2009-01-01	2009-12-31
b	Vanguard Group 2009 LTCG dividends	P	2005-06-30	2009-12-31
c	Vanguard Group 2009 transfers	P	2009-01-01	2009-12-31
d	Vanguard Group 2009 transfers	P	2005-06-30	2009-12-31
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 4,649			4,649
b 1,143			1,143
c 230,406		500,000	-269,594
d 4,734,209		4,751,578	-17,369
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			4,649
b			1,143
c			-269,594
d			-17,369
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	-281,171
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	-264,945

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	1,563,102	23,465,767	0 06661
2007	1,582,668	27,848,460	0 05683
2006	1,602,058	26,341,876	0 06082
2005	1,579,955	25,163,048	0 06279
2004	1,536,183	24,748,810	0 06207

2 Total of line 1, column (d).	2	0 30912
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 06182
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	20,099,380
5 Multiply line 4 by line 3.	5	1,242,624
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	6,909
7 Add lines 5 and 6.	7	1,249,533
8 Enter qualifying distributions from Part XII, line 4.	8	1,198,055

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

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

1a		Exempt operating foundations described in section 4940(d)(2), check here <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 type="checkbox"/> and enter 1% of Part I, line 27b		1	13,817
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3		Add lines 1 and 2.		3	13,817
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	13,817
6		Credits/Payments			
a		2009 estimated tax payments and 2008 overpayment credited to 2009	6a24,000		
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c		
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	24,000
8		Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> 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	10,183
11		Enter the amount of line 10 to be Credited to 2010 estimated tax	10,183	Refunded	11

Part VII-AStatements Regarding Activities

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?		Yes	No
		1a		No
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)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ (2) On foundation managers \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either <ul style="list-style-type: none">By language in the governing instrument, orBy state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the 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 .	8b	Yes	
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)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

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		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of Gary DePolo Telephone no (925) 284-4427 Located at 3685 Mt Diablo Blvd 269 Lafayette CA ZIP+4 94549			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.			
		15		

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. Yes No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). Yes No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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?.	1c		No
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?. If "Yes," list the years 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. Yes No			
b	If "Yes," did it have excess business holdings in 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		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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.	5b		No
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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			
	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?			
	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		No

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 Additional Data Table				
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
NONE		
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 THE FOUNDATION HAS ONE CHARITABLE ACTIVITY (SEE EXPLANATION IN PART XVI-B)	0
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3.	

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	19,751,579
b	Average of monthly cash balances.	1b	653,883
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	20,405,462
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	
3	Subtract line 2 from line 1d.	3	20,405,462
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	306,082
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	20,099,380
6	Minimum investment return. Enter 5% of line 5.	6	1,004,969

Part XI

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

1	Minimum investment return from Part X, line 6.	1	1,004,969
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	13,817
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	13,817
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	991,152
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	991,152
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	991,152

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	1,198,055
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,198,055
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,198,055
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
1	Distributable amount for 2009 from Part XI, line 7				991,152
2	Undistributed income, if any, as of the end of 2008				
a	Enter amount for 2008 only.				
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2009				
a	From 2004.				332,137
b	From 2005.				344,881
c	From 2006.				304,498
d	From 2007.				223,950
e	From 2008.				430,900
f	Total of lines 3a through e.	1,636,366			
4	Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 1,198,055				
a	Applied to 2008, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d	Applied to 2009 distributable amount.				991,152
e	Remaining amount distributed out of corpus	206,903			
5	Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6	Enter the net total of each column as indicated below:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,843,269			
b	Prior years' undistributed income Subtract line 4b from line 2b.				
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .				
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	332,137			
9	Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,511,132			
10	Analysis of line 9				
a	Excess from 2005.				344,881
b	Excess from 2006.				304,498
c	Excess from 2007.				223,950
d	Excess from 2008.				430,900
e	Excess from 2009.				206,903

Part XIV

1a 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.

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))

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

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

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			▶ 3a	1,093,833
b Approved for future payment				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2009)

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?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
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

Sign Here

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

*****	2010-03-30	*****
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only	Preparer's Signature  Sherry Matsumoto	Date	Check if self-employed 	Preparer's identifying number (see Signature on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code 	Harrison Accounting Group Inc 37272 Maple Street Fremont, CA 94536		EIN  Phone no (510) 793-4323


Additional Data

Software ID: 09000047
Software Version:
EIN: 94-6108391
Name: LOWELL BERRY FOUNDATION


Form 990PF Part VIII Line 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
ANNETTE S ROBISON	Director 2 00	0		
3154 Lucas Drive Lafayette, CA 94549				
JAYNE S MORDELL	Director 1 00	0		
40 Palmer Lane Portola Valley, CA 94028				
JOHN ASHER	DIRECTOR 3 00	0		
3175 Walnut Blvd Walnut Creek, CA 94596				
JAMI S KANE	Director 2 00	0		
314 Las Quebradas Lane Alamo, CA 94507				
GARY L DEPOLO	Treasurer 5 00	0		
37 CHARLES HILL CIRCLE ORINDA, CA 94563				
PATRICIA B CONKLIN	Vice President 4 00	0		
2361 BAY VIEW AVENUE CARMEL, CA 93921				
BARBARA B CORNEILLE	Secretary 3 00	0		
112 LARK COURT ALAMO, CA 94507				
LARRY R LANGDON	PRESIDENT 1 00	0		
137 ASH LANE PORTOLA VALLEY, CA 94028				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
Young Womens Christian Assoc2600 Bancroft Way Berkeley, CA 94704	Charitable	501(c)3	Youth Mentor Program	3,000
WCC Salesian Boys & Girls ClubPO Box 6120 San Pablo, CA 94806	Charitable	501(c)3	Computer Tutor	4,000
Wardrobe for O pportunity570 14th St Ste 5 Oakland, CA 94512	Charitable	501(c)3	Job Seeker Interviews	4,000
Walnut Creek Education Foundation960 Ygnacio Valley Rd Walnut Creek, CA 94596	Charitable	501(c)3	General Support	2,000
United Service Organizations Inc211 Wilson Blvd Ste 1200 Arlington, VA 22201	Charitable	501(c)3	General Support	250
Tri-Valley Baseball Academy3574 Ovella Way Pleasanton, CA 94566	Charitable	501(c)3	General Support	2,875
Super Stars Literacy Inc675 Hegenburger Rd Ste 250 Oakland, CA 94621	Charitable	501(c)3	General Support	4,000
Stanford Univ - Dept of Athletics326 Galvez Street Stanford, CA 94305	Charitable	501(c)3	General Support	17,000
Sports 4 Kids517 Fourth St Oakland, CA 94607	Charitable	501(c)3	General Support	2,000
Sophia Project1724 Myrtle St Oakland, CA 94607	Charitable	501(c)3	General Support	3,000
San Ramon Valley Ed FndAlamo100 Wilson Rd Alamo, CA 94507	Charitable	501(c)3	Alamo & Stone Valley Sch Ed Fund	1,175
San Francisco Ballet455 Franklin St San Francisco, CA 94102	Charitable	501(c)3	General Support	250
St Elizabeth High School1530 - 34th Ave Oakland, CA 94601	Charitable	501(c)3	Y E S Team	4,000
PTA CA Congress of PTA561 Merriewood Dr Lafayette, CA 94549	Charitable	501(c)3	General Support	1,800
Placer Co Sheriffs Dept Search & Rescue2929 Richardson Dr Auburn, CA 95603	Charitable	501(c)3	General Support	250
Total  3a				1,093,833


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
Peninsula Ball FoundationPO Box 1032 Menlo Park, CA 94026	Charitable	501(c)3	General Support	500
Oakland Youth Chorus2501 Harrison St Oakland, CA 94612	Charitable	501(c)3	Middle & High School Chorus	1,500
Next Step Learning Center222 Curtis St Oakland, CA 94607	Charitable	501(c)3	General Support	3,000
Mt Herman Association IncPO Box 413 Mt Hermon, CA 95041	Charitable	501(c)3	Camperships	500
Love-A-Child Missions2301 Willow Pass Rd Bay Point, CA 94565	Charitable	501(c)3	General Support	3,500
John Muir Foundation1400 Treat Blvd Ste 30 Walnut Creek, CA 94597	Charitable	501(c)3	Caring Hands	2,000
Jewish Community Foundation200 Grand Ave Oakland, CA 94610	Charitable	501(c)3	Heifer Int'l Found	1,000
Independent Scholarship Fund100 Swan Way Oakland, CA 94621	Charitable	501(c)3	Needs-Based Scholarships	3,000
Homeward Bound Golden Retriever7495 Natomas Rd Elverta, CA 95626	Charitable	501(c)3	General Support	100
Holy Names University3500 Mountain Blvd Oakland, CA 94619	Charitable	501(c)3	Campus Leadership	5,000
Hispanic Ministry Center Inc6925 Aragon Circle Ste 6 Buena Park, CA 90620	Charitable	501(c)3	RELOAD Bay Area	2,500
Head-Royce School4315 Lincoln Ave Oakland, CA 94602	Charitable	501(c)3	Heads Up Program	3,000
Fresh Start Walnut Creek1924 Trinity Ave Walnut Creek, CA 94596	Charitable	501(c)3	General Support	6,300
FESCO21455 Birch St 5 Hayward, CA 94541	Charitable	501(c)3	General Support	2,000
Family Violence Law CenterPO Box 22009 Oakland, CA 94623	Charitable	501(c)3	General Support	2,000
Total  3a				1,093,833


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
Court Appointed Spec Repres Program2020 North Broadway Ste 204 Walnut Creek, CA 94596	Charitable	501(c)3	General Support	4,000
Contra Costa Kops for Kids1430 Willow Pass Rd 130 Concord, CA 94520	Charitable	501(c)3	Seminars & Clinics	2,000
Children of Grace4456 Deer Ridge Rd Danville, CA 94506	Charitable	501(c)3	Various Programs	1,000
Center for the Ed of Infant Deaf1035 Grayson St Berkeley, CA 94710	Charitable	501(c)3	Home Visit Program	1,500
CC Interfaith Transitional Housing 535 Main St Ste 209 Martinez, CA 94553	Charitable	501(c)3	Homeless Services	1,000
Carmel FoundationPO Box 1050 Carmel, CA 93921	Charitable	501(c)3	General Support	500
Carmel-by-the-Sea Public Library FoundPO Box 2042 Carmel, CA 93921	Charitable	501(c)3	General Support	500
California Assoc of Student Council 1212 Preservation Park Way Oakland, CA 94612	Charitable	501(c)3	Scholarships	2,000
California Academy of Science55 Concourse Golden Gate Park San Francisco, CA 94118	Charitable	501(c)3	General Support	500
Blind Babies Foundation1814 Franklin Ave Oakland, CA 94612	Charitable	501(c)3	General Support	1,000
Bay Area Community Resources171 Carlos Drive San Rafael, CA 94903	Charitable	501(c)3	Willard Youth	3,000
Animal Rescue Foundation - ARFPO Box 30215 Walnut Creek, CA 94598	Charitable	501(c)3	General support	200
An Episcopal Minst to Conv Hospital 1700 Santa Clara Ave Alameda, CA 94501	Charitable	501(c)3	Chaplin Coord	2,500
American Cancer Society - RLLA747 Camden Ave Ste 5 Campbell, CA 95008	Charitable	501(c)3	Relay Life - Los Altos	500
Wounded Warrior Project WWP7020 ACSkinner Pkwy Ste 100 Jacksonville, FL 32256	Charitable	501(c)3	General Support	750
Total ▶ 3a				1,093,833


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
WellSpringPO Box 7384 Menlo Park, CA 94026	Charitable	501(c)3	General Support	2,500
WEC InternationalPO Box 1707 Fort Washington, PA 19034	Charitable	501(c)3	Plaster Family Fund/General Supp	2,000
WCPC Foundation1801 Lacassie Ave Walnut Creek, CA 94596	Charitable	501(c)3	Preparing a Place	10,000
Walnut Creek Presbyterian Church 1801 Lacassie Ave Walnut Creek, CA 94596	Charitable	501(c)3	General Support	2,000
Transfiguration Episcopal Church 3900 Alameda de las Pulgas San Mateo, CA 94403	Charitable	501(c)3	General Support	250
Stanford University Medical Center 2700 San Hill Rd Stanford, CA 94025	Charitable	501(c)3	J Berry/Psych & Behvral	2,000
Stanford University326 Galvez St Stanford, CA 94305	Charitable	501(c)3	Stanford Review	250
The Stanford Fund326 Galvez St Stanford, CA 94305	Charitable	501(c)3	General Support	250
St Vincent De Paul - Farm Workers 3080 Rio Rd Carmel, CA 93923	Charitable	501(c)3	Farm Workers Program	750
St Stephens Episcopal Church66 St Stephens Dr Orinda, CA 94563	Charitable	501(c)3	General Support	5,000
Shelter Outreach PlusPO Box 1340 Marina, CA 93933	Charitable	501(c)3	General Support	500
San Ramon Valley ThunderbirdsPO Box 490 San Ramon, CA 94583	Charitable	501(c)3	General Support	1,000
San Francisco SymphonyDavies Symphony Hall San Francisco, CA 94102	Charitable	501(c)3	General Support	750
San Francisco Opera Assoc301 Van Ness Ave San Francisco, CA 94102	Charitable	501(c)3	General Support	500
Punahou School1601 Puahou St Honolulu, HI 96822	Charitable	501(c)3	General Support	100
Total  3a				1,093,833

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
Navy Seal Warrior Fund Inc162 West 56th St Ste 405 New York, NY 10019	Charitable	501(c)3	General Support	250
Monterey County Symphony Assoc PO Box 3965 Carmel, CA 93921	Charitable	501(c)3	General Support	2,000
Lucile Packard Childrens Fund400 Hamilton Ave Ste 340 Palo Alto, CA 94301	Charitable	501(c)3	General Support	100
Lafayette Library & Learning Center PO Box 1472 Lafayette, CA 94549	Charitable	501(c)3	General Support	100
Lafayette Arts & Science FoundPO Box 923 Lafayette, CA 94549	Charitable	501(c)3	General Support	2,000
Kids Alive International Inc2507 Cumberland Dr Valparaiso, IN 46383	Charitable	501(c)3	General Support	1,000
Junior League of Monterey County391 Decatur St Monterey, CA 93940	Charitable	501(c)3	General Support	500
The Hoover Institution326 Galvez St Stanford, CA 94305	Charitable	501(c)3	General Support	2,000
Heartfelt Music & Ministry Inc821 Richard Lane Danville, CA 94526	Charitable	501(c)3	General Support	500
East Bay Zoological Society9777 Golf Links Rd Oakland, CA 94605	Charitable	501(c)3	Camperships	2,000
CU-Boulder Alumni Scholarship Fund 4740 Walnut St Boulder, CO 80301	Charitable	501(c)3	General Support	100
Crystal Cathedral Ministries12141 Lewis St Garden Grove, CA 92840	Charitable	501(c)3	Hour of Power	500
Cornerstone Fellowship348 N Canyon Pkwy Livermore, CA 94551	Charitable	501(c)3	General Support	2,000
Community Hospital Foundation1000 Munras Ave Ste 200 Monterey, CA 94940	Charitable	501(c)3	General Support	1,000
Childrens Hospital & Research Center 2201 Broadway Ste 600 Oakland, CA 94612	Charitable	501(c)3	General Support	100
Total  3a				1,093,833


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
Character Choice Inc1545 Tanaka Dr Erie, CO 80516	Charitable	501(c)3	General Support	2,500
Bishop O Dowd Catholic High School 9500 Stearns Ave Oakland, CA 94605	Charitable	501(c)3	General Support	9,950
Bayshore Christian Ministries1001 Beech St East Palo Alto, CA 94303	Charitable	501(c)3	General Support	3,000
Assistance League of Diablo Valley 2711 Buena Vista Ave Walnut Creek, CA 94597	Charitable	501(c)3	General Support	100
All Saints Episcopal ChurchPO Box 1296 Carmel, CA 93921	Charitable	501(c)3	General Support	3,000
YMCA of the East Bay2330 Broadway Oakland, CA 94612	Charitable	501(c)3	Camperships	3,500
YMCA Berkeley-Albany2070 Allston Way Ste 101 Berkeley, CA 94704	Charitable	501(c)3	Camperships	2,000
VESTIA30 Muir Rd Martinez, CA 93553	Charitable	501(c)3	Camperships	5,000
Trips for Kids138 Sunnyside Mill Valley, CA 94941	Charitable	General Support	General Support	3,000
Tri-Cities League of Volunteers 36120 Ruschin Dr Newark, CA 94560	Charitable	501(c)3	Summer Rec	2,000
Todays Youth Matter461 Valley Way Milpitas, CA 95035	Charitable	501(c)3	Camperships	2,500
Tides Center The PresidioPO Box 29907 San Francisco, CA 94129	Charitable	501(c)3	Visual Arts/Language	2,500
Taylor Family Foundation5555 Arroyo Rd Livermore, CA 94550	Charitable	501(c)3	Camperships	5,000
Stepping Stones Growth Center311 MacArthur Blvd San Leandro, CA 94577	Charitable	501(c)3	Co-pay Scholarship	833
Stand Against Domestic Violence 1410 Danzig Plaza Ste 200 Concord, CA 94520	Charitable	501(c)3	General Support	7,500
Total  3a				1,093,833


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
Stagebridge2501 Harrison St Oakland, CA 94612	Charitable	501(c)3	General Support	2,000
Sierra Service ProjectPO Box 992 Carmichael, CA 95609	Charitable	501(c)3	Camperships	1,500
Shelter Inc of Contra Costa County 1815 Arnold Dr Martinez, CA 94553	Charitable	Transitional Housing	Transitional Housing	4,000
Seneca Res & Day Treatment Center 2275 Arlington Dr San Leandro, CA 94578	Charitable	501(c)3	Camperships	2,500
Samaritan Neighborhood Center534 - 22nd St Oakland, CA 94612	Charitable	501(c)3	S T E P	3,500
The Salvation Army379 12th St Oakland, CA 94612	Charitable	501(c)3	General Support & X-mas Turkeys	11,000
St Vincent de Paul - Contra Costa Cnty2210 Gladstone Dr Pittsburg, CA 94565	Charitable	Various Programs	Various Programs	7,000
St Marys CollegePO Box 4300 Moraga, CA 94575	Charitable	Vern Oswald Scholars	Vern Oswald Scholarship	2,500
St Marys Center925 Brockhurst St Oakland, CA 94608	Charitable	Winter Shelter Progr	Winter Shelter Program	2,000
St Elizabeth Elementary School1516 - 33rd Ave Oakland, CA 94601	Charitable	Special Needs Progra	Special Needs Program	2,500
SF Bay Area Council No 28 - BS1001 Davis St San Leandro, CA 94577	Charitable	501(c)3	Camperships	4,000
Regional Parks FoundationPO Box 21074 Oakland, CA 94620	Charitable	501(c)3	Camperships	4,000
Prescott-Joseph Center920 Peralta St Oakland, CA 94607	Charitable	501(c)3	After School Tutoring	2,000
Okizu Foundation16 Digital Dr Novato, CA 94949	Charitable	501(c)3	Camperships	4,000
Oakland Elizabeth House6523 Colby St Oakland, CA 94618	Charitable	501(c)3	General Support	3,000
Total ▶ 3a				1,093,833


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
Northern Light School3710 Dorisa Ave Oakland, CA 94605	Charitable	501(c)3	Fine Arts Program	4,000
Monument Crisis Center2350 Monument Blvd Ste B Concord, CA 94520	Charitable	501(c)3	General Support	4,000
Loaves & Fishes of Contra CostaPO Box 3335 Danville, CA 94526	Charitable	501(c)3	General Support	4,000
Lindsay Wildlife Museum1931 First Ave Walnut Creek, CA 94597	Charitable	501(c)3	Interpretive Guide Program	4,000
Lighthouse for the Blind214 Van Ness Ave San Francisco, CA 94102	Charitable	501(c)3	Camperships	1,000
Legal Assistance for Seniors464 Seventh St Oakland, CA 94607	Charitable	501(c)3	General Support	1,000
Kidpower Teenpower FullpowerPO Box 2163 Castro Valley, CA 94546	Charitable	501(c)3	Victimization Risk	1,500
Junior Center of Art and Science558 Bellevue Ave Oakland, CA 94610	Charitable	501(c)3	Camperships	1,500
JFK University100 Ellinwood Way Pleasant Hill, CA 94523	Charitable	501(c)3	Camperships	3,000
Interfaith Council of CC County1543 Sunnyvale Ave Walnut Creek, CA 94597	Charitable	501(c)3	Winter Nights Program	4,000
Hayward Youth Academy1065 A Street Hayward, CA 94545	Charitable	501(c)3	General Support	500
Girl Scouts of San Francisco Bay Area7700 Edgewater Dr Ste 340 Oakland, CA 94621	Charitable	501(c)3	Camperships	3,500
Friends of Oakland Parks & RecreationPO Box 13267 Oakland, CA 94661	Charitable	501(c)3	Ace Kids Golf Program	3,500
The Foundation Center312 Sutter St Ste 606 San Francisco, CA 94108	Charitable	501(c)3	General Support	1,000
Family Support Services of the Bay Area401 Grand Ave Ste 500 Oakland, CA 94610	Charitable	501(c)3	OreMi Mentoring	4,000
Total  3a				1,093,833

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
Family Paths Inc1727 Martin Luther King Jr Wy Oakland, CA 94612	Charitable	501(c)3	Children's Counselor	2,000
Community Alliance for LearningPO Box 6098 Berkeley, CA 94706	Charitable	501(c)3	Writer Coach Con	2,000
Christs Kids Sports Ministry16 Ultima Ct Danville, CA 94526	Charitable	501(c)3	Camperships	3,000
Chabot Space & Science Center1000 Skyline Blvd Oakland, CA 94619	Charitable	501(c)3	Teacher Training Program	8,000
Catholic Charities of the East Bay433 Jefferson St Oakland, CA 94607	Charitable	501(c)3	General Support	5,000
Cantare Con Vivo1611 Telegraph Ave Ste 826 Oakland, CA 94612	Charitable	501(c)3	Children's Choir	2,500
Camps in CommonPO Box 11061 Oakland, CA 94611	Charitable	501(c)3	Camp Scholarships	3,000
California Symphony Orchestra877 Ygnacio Valley Rd Ste 200 Walnut Creek, CA 94596	Charitable	501(c)3	Music in the Schools	2,000
Bread Project815 Washington St Oakland, CA 94607	Charitable	501(c)3	Ingredients & Pic	5,000
Boy Scouts - Mt Diablo Silverado800 Ellinwood Way Pleasant Hill, CA 94523	Charitable	501(c)3	Camperships	4,000
Boys & Girls Club - Oakland3300 High St Oakland, CA 94619	Charitable	501(c)3	Camperships	3,000
Berkeley Food & Housing Project2140 Dwight Way Berkeley, CA 94704	Charitable	501(c)3	No Cnty Women	2,000
Bay Area Parent Leadership Action405 - 14th St Ste 811 Oakland, CA 94612	Charitable	501(c)3	Parents Ready	2,000
Ariel Outreach MissionPO Box 5035 Oakland, CA 94605	Charitable	501(c)3	General Support	6,500
Alameda County Meals on Wheels6955 Foothill Blvd Oakland, CA 94605	Charitable	501(c)3	Senior Holiday Gifts	2,000
Total  3a				1,093,833

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
Alameda County Library Foundation 2450 Stevenson Blvd Fremont, CA 94538	Charitable	501(c)3	Homework Center	4,500
A Safe PlacePO Box 23006 Oakland, CA 94623	Charitable	501(c)3	General Support	4,000
Young Life - Diablo ValleyPO Box 520 Colorado Springs, CO 80901	Charitable	501(c)3	General Support/Camperships	29,500
Young Life of ConcordPO Box 563 Concord, CA 94522	Charitable	501(c)3	Monument Youth/Camperships	9,000
School of Urban MissionsPO Box 14145 Oakland, CA 94614	Charitable	501(c)3	General Support	141,500
The Renewal Project Inc1717 N California Blvd Ste 3D Walnut Creek, CA 94596	Charitable	501(c)3	Various Programs	40,000
Prison Fellowship Ministries44180 Riverside Pkwy Lansdowne, VA 20176	Charitable	501(c)3	Angel Tree 2009	25,000
Patten University2433 Coolidge Ave Oakland, CA 94601	Charitable	501(c)3	Praxis Scholarships	15,000
New College Adv Christian Studies 2029 Durant Ave Berkeley, CA 94704	Charitable	501(c)3	Christian Spirit	7,500
The Leadership Connection5075 St Celestine Ct Concord, CA 94521	Charitable	501(c)3	Various Programs	15,000
Joni & Friends - SF Bay Area3553 Castro Valley Blvd Castro Valley, CA 94546	Charitable	501(c)3	Family Retreats	27,500
InterVarsity Christian Fellowship 32802 Matthew Dr Dana Point, CA 92629	Charitable	501(c)3	Multiple Ministries	26,000
Hawaiian Islands MinistriesPO Box 777 Honolulu, HI 96808	Charitable	501(c)3	General Ministry	30,000
Harbor House1811 - 11th Ave Oakland, CA 94606	Charitable	501(c)3	General Support	25,000
Fuller Theological Seminary135 North Oakland Ave Pasadena, CA 91182	Charitable	501(c)3	Various Programs	168,500
Total  3a				1,093,833

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
Faith Network of the East Bay Inc 2633 Telegraph Ave 409 Oakland, CA 94612	Charitable	501(c)3	General Support	25,000
City Team MinistriesPO Box 23833 Oakland, CA 94623	Charitable	501(c)3	General Support	33,500
Campus Crusade for Christ1922 Grant St Apt 5 Berkeley, CA 94703	Charitable	501(c)3	Berkeley Leaders	7,000
The Bay Area Urban Network745 - 105th Ave Oakland, CA 94603	Charitable	501(c)3	General Support	101,500
Bay Area Rescue Mission2114 Macdonald Ave Richmond, CA 94802	Charitable	General Support	Homeless Program	10,000
Total				1,093,833

TY 2009 Accounting Fees Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 09000047

Software Version: 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Harrison Accounting Group	24,051	1,203	0	22,848

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2009 Depreciation Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 09000047

Software Version: 2009v1.3

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Dell computer	2007-01-09	1,290	387	54	20 00 %	258			
Oil Portraits	2006-10-27	2,701	820	58	14 29 %	386			
Oil Portraits	2006-03-28	4,000	1,643	58	14 29 %	572			

TY 2009 Investments - Other Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 09000047**Software Version:** 2009v1.3

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
American Funds	FMV	1,047,045	1,047,045
Vanguard Group	FMV	21,420,925	21,420,925

TY 2009 Land, Etc. Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 09000047

Software Version: 2009v1.3

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	64,316	60,391	3,925	3,925

TY 2009 Other Expenses Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 09000047**Software Version:** 2009v1.3

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Telephone	1,707	85		1,622
Portfolio fees	15		15	
Office supplies	1,898	95		1,803
Insurance	6,866	343		6,523
Dues & subscriptions	450	22		428
Bank charges	50	3		47

TY 2009 Other Increases Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 09000047

Software Version: 2009v1.3

Description	Amount
Change in unrealized gain in invest.	4,372,890

TY 2009 Other Liabilities Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 09000047**Software Version:** 2009v1.3

Description	Beginning of Year - Book Value	End of Year - Book Value
Payroll tax payable	1,452	1,672

TY 2009 Other Professional Fees Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 09000047

Software Version: 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Computer technician	950	48	0	902

TY 2009 Taxes Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 09000047

Software Version: 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
State Form 199 fee	10	1		9
Personal property taxes	157	8		149
Payroll taxes	2,948	147		2,801
Foreign tax on dividends	2,365	2,365		
Excise tax on investment	13,817			