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Form 990-PF

## Return of Private Foundation

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

2009

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

Department of the Treasury  
Internal Revenue Service

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

Number and street (or P O box number if mail is not delivered to street address)  
3685 Mt Diablo Blvd

Room/  
suite

City or town, state, and ZIP code  
Lafayette, CA 94549

**A Employer identification number**

94-6108391

**B Telephone number (see page 10 of the instructions)**  
(925) 284-4427

**C** If exemption application is pending, check here

**D** 1. Foreign organizations, check here

2. Foreign organizations meeting the 85% test, check here and attach computation

**E** If private foundation status was terminated under section 507(b)(1)(A), check here

**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

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

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

| <b>Part II</b> <b>Balance Sheets</b> | 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 |
| <b>1</b>                             | Cash—non-interest-bearing . . . . .   | 50                | 50             | 50                    |
| <b>2</b>                             | Savings and temporary cash investments . . . . .  | 783,509           | 617,770        | 617,770               |
| <b>3</b>                             | Accounts receivable ►   |                   |                |                       |
|                                      | Less allowance for doubtful accounts ►  |                   |                |                       |
| <b>4</b>                             | Pledges receivable ►  |                   |                |                       |
|                                      | Less allowance for doubtful accounts ►  |                   |                |                       |
| <b>5</b>                             | Grants receivable . . . . .   |                   |                |                       |
| <b>6</b>                             | Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions) . . . . .          |                   |                |                       |
| <b>7</b>                             | Other notes and loans receivable (attach schedule) ►  |                   |                |                       |
|                                      | Less allowance for doubtful accounts ►  |                   |                |                       |
| <b>8</b>                             | Inventories for sale or use . . . . .   |                   |                |                       |
| <b>9</b>                             | Prepaid expenses and deferred charges . . . . .   | 17,957            | 10,183         | 10,183                |
| <b>10a</b>                           | Investments—U S and state government obligations (attach schedule)  |                   |                |                       |
| <b>b</b>                             | Investments—corporate stock (attach schedule) . . . . .   |                   |                |                       |
| <b>c</b>                             | Investments—corporate bonds (attach schedule) . . . . .   |                   |                |                       |
| <b>11</b>                            | Investments—land, buildings, and equipment basis ►  |                   |                |                       |
|                                      | Less accumulated depreciation (attach schedule) ►   |                   |                |                       |
| <b>12</b>                            | Investments—mortgage loans . . . . .  |                   |                |                       |
| <b>13</b>                            | Investments—other (attach schedule) . . . . .   | 18,723,353        | 22,467,970     | 22,467,970            |
| <b>14</b>                            | Land, buildings, and equipment basis ► 64,316   |                   |                |                       |
|                                      | Less accumulated depreciation (attach schedule) ► 60,391  | 5,141             | 3,925          | 3,925                 |
| <b>15</b>                            | Other assets (describe ► )  |                   |                |                       |
| <b>16</b>                            | <b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)   | 19,530,010        | 23,099,898     | 23,099,898            |
| <b>17</b>                            | Accounts payable and accrued expenses . . . . .   |                   |                |                       |
| <b>18</b>                            | Grants payable . . . . .  |                   |                |                       |
| <b>19</b>                            | Deferred revenue . . . . .  |                   |                |                       |
| <b>20</b>                            | Loans from officers, directors, trustees, and other disqualified persons  |                   |                |                       |
| <b>21</b>                            | Mortgages and other notes payable (attach schedule) . . . . .   |                   |                |                       |
| <b>22</b>                            | Other liabilities (describe ► )   | 1,452             | 1,672          | 1,672                 |
| <b>23</b>                            | <b>Total liabilities</b> (add lines 17 through 22) . . . . .  | 1,452             | 1,672          | 1,672                 |
|                                      | <b>Foundations that follow SFAS 117, check here ►</b> <input checked="" type="checkbox"/><br><b>and complete lines 24 through 26 and lines 30 and 31.</b> |                   |                |                       |
| <b>24</b>                            | Unrestricted . . . . .  | 19,528,558        | 23,098,226     |                       |
| <b>25</b>                            | Temporarily restricted . . . . .  |                   |                |                       |
| <b>26</b>                            | Permanently restricted . . . . .  |                   |                |                       |
|                                      | <b>Foundations that do not follow SFAS 117, check here ►</b> <input type="checkbox"/><br><b>and complete lines 27 through 31.</b>                         |                   |                |                       |
| <b>27</b>                            | Capital stock, trust principal, or current funds . . . . .  |                   |                |                       |
| <b>28</b>                            | Paid-in or capital surplus, or land, bldg , and equipment fund  |                   |                |                       |
| <b>29</b>                            | Retained earnings, accumulated income, endowment, or other funds  |                   |                |                       |
| <b>30</b>                            | <b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .  | 19,528,558        | 23,098,226     |                       |
| <b>31</b>                            | <b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .   | 19,530,010        | 23,099,898     |                       |

**Part III Analysis of Changes in Net Assets or Fund Balances**

|          |  |          |            |
|----------|--|----------|------------|
| <b>1</b> | 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) . . . . . | <b>1</b> | 19,528,558 |
| <b>2</b> | Enter amount from Part I, line 27a . . . . .   | <b>2</b> | -803,222   |
| <b>3</b> | Other increases not included in line 2 (itemize) ►   | <b>3</b> | 4,372,890  |
| <b>4</b> | Add lines 1, 2, and 3 . . . . .  | <b>4</b> | 23,098,226 |
| <b>5</b> | Decreases not included in line 2 (itemize) ►   | <b>5</b> |            |
| <b>6</b> | Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .  | <b>6</b> | 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<br>P—Purchase<br>D—Donation  | (c) Date acquired<br>(mo., day, yr.)                    | (d) Date sold<br>(mo., day, yr.)  |
|---|--|---|---|---|
| <b>1 a</b>  | Vanguard Group 2009 STCG dividends   | P   | 2009-01-01  | 2009-12-31  |
| <b>b</b>  | Vanguard Group 2009 LTCG dividends   | P   | 2005-06-30  | 2009-12-31  |
| <b>c</b>  | Vanguard Group 2009 transfers  | P   | 2009-01-01  | 2009-12-31  |
| <b>d</b>  | Vanguard Group 2009 transfers  | P   | 2005-06-30  | 2009-12-31  |
| <b>e</b>  |  |   |   |   |
| <b>(e) Gross sales price</b>  |  | <b>(f) Depreciation allowed<br/>(or allowable)</b>  | <b>(g) Cost or other basis<br/>plus expense of sale</b> | <b>(h) Gain or (loss)<br/>(e) plus (f) minus (g)</b>  |
| <b>a</b>  | 4,649  |   |   | 4,649   |
| <b>b</b>  | 1,143  |   |   | 1,143   |
| <b>c</b>  | 230,406  |   | 500,000   | -269,594  |
| <b>d</b>  | 4,734,209  |   | 4,751,578   | -17,369   |
| <b>e</b>  |  |   |   |   |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69   |  |   |   | <b>(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))</b> |
| <b>(i) F M V as of 12/31/69</b>   | <b>(j) Adjusted basis<br/>as of 12/31/69</b>                                 | <b>(k) Excess of col (i)<br/>over col (j), if any</b>   |   |   |
| <b>a</b>  |  |   |   | 4,649   |
| <b>b</b>  |  |   |   | 1,143   |
| <b>c</b>  |  |   |   | -269,594  |
| <b>d</b>  |  |   |   | -17,369   |
| <b>e</b>  |  |   |   |   |
| <b>2</b>  | Capital gain net income or (net capital loss)                                | <small>If gain, also enter in Part I, line 7<br/>If (loss), enter -0- in Part I, line 7</small> | <b>2</b>  | -281,171  |
| <b>3</b>  | Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) |   | <b>3</b>  | -264,945  |
| If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions)<br>If (loss), enter -0- in Part I, line 8 |  |   |   |   |

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

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

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

 Yes  No

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

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

| <b>(a)</b><br>Base period years<br>Calendar year<br>(or tax year beginning in) | <b>(b)</b><br>Adjusted qualifying distributions | <b>(c)</b><br>Net value of noncharitable-use assets | <b>(d)</b><br>Distribution ratio<br>(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  |
| <b>2</b>   |   |   | <b>2</b> 0 30912   |
| <b>3</b>   |   |   | <b>3</b> 0 06182   |
| <b>4</b>   |   |   | <b>4</b> 20,099,380  |
| <b>5</b>   |   |   | <b>5</b> 1,242,624   |
| <b>6</b>   |   |   | <b>6</b> 6,909   |
| <b>7</b>   |   |   | <b>7</b> 1,249,533   |
| <b>8</b>   |   |   | <b>8</b> 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 VI Excise 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                               | 1  | 13,817 |
|    | Date of ruling or determination letter _____ <b>(attach copy of letter if necessary—see instructions)</b>   |    |        |
| 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 . . . . . |    |        |
| 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  | <b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .   | 5  | 13,817 |
| 6  | <b>Credits/Payments</b>   |    |        |
| a  | 2009 estimated tax payments and 2008 overpayment credited to 2009   | 6a | 24,000 |
| 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 <b>penalty</b> for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached                        | 8  |        |
| 9  | <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .   | 9  |        |
| 10 | <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .   | 10 | 10,183 |
| 11 | Enter the amount of line 10 to be <b>Credited to 2010 estimated tax</b> <input type="checkbox"/> 10,183 <b>Refunded</b> <input type="checkbox"/> 11       | 11 |        |

**Part VII-A Statements 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 |
| 1b | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . .   | Yes | No |
|    | <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>  |     |    |
| 1c | Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .   | Yes | No |
| d  | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year<br><b>(1)</b> On the foundation <input type="checkbox"/> \$ _____ <b>(2)</b> On foundation managers <input type="checkbox"/> \$ _____   |     |    |
| e  | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____  |     |    |
| 2  | Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .<br><i>If "Yes," attach a detailed description of the activities.</i>  | Yes | No |
| 3  | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>   | Yes | No |
| 4a | Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .   | Yes | No |
| b  | If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .   | Yes | No |
| 5  | Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .<br><i>If "Yes," attach the statement required by General Instruction T.</i>  | Yes | No |
| 6  | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either<br>● By language in the governing instrument, or<br>● 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? . . . . . | Yes |    |
| 7  | Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>   | Yes |    |
| 8a | Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input type="checkbox"/> 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? <i>If "No," attach explanation.</i>   | 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)? <i>If "Yes," complete Part XIV</i>  | Yes | No |
| 10 | Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>   | Yes | 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). . . . .         | <input type="checkbox"/> 11                     |   | <input type="checkbox"/> No |
| 12                    | Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? . . . . .   | <input type="checkbox"/> 12                     |   | <input type="checkbox"/> No |
| 13                    | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . .   | <input type="checkbox"/> 13                     | <input checked="" type="checkbox"/> Yes |                             |
| Website address ► N/A |   |   |   |                             |
| 14                    | The books are in care of ► Gary DePolo<br>Located at ► 3685 Mt Diablo Blvd 269 Lafayette CA   | Telephone no ► (925) 284-4427<br>ZIP +4 ► 94549 |   |                             |
| 15                    | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ► 15<br>and enter the amount of tax-exempt interest received or accrued during the year . . . . . ► |   |   |                             |

**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. |  | <input type="checkbox"/> Yes | <input type="checkbox"/> No            |
|---|--|------------------------------|--|
| <b>1a</b>   | During the year did the foundation (either directly or indirectly)   |                              |  |
| (1)   | Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (2)   | Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (3)   | Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (4)   | Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (5)   | Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . .  | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (6)   | Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| <b>b</b>  | If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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)? . . . . .<br>Organizations relying on a current notice regarding disaster assistance check here. . . . . ►  | <input type="checkbox"/> 1b  | <input type="checkbox"/> No            |
| <b>c</b>  | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009? . . . . .  | <input type="checkbox"/> 1c  | <input type="checkbox"/> No            |
| <b>2</b>  | 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))  |                              |  |
| <b>a</b>  | At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? . . . . .  | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
|   | If "Yes," list the years ► 20____, 20____, 20____, 20____  |                              |  |
| <b>b</b>  | Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see page 20 of the instructions) . . . . .  | <input type="checkbox"/> 2b  | <input type="checkbox"/> No            |
| <b>c</b>  | 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____   |                              |  |
| <b>3a</b>   | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| <b>b</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) . . . . . | <input type="checkbox"/> 3b  | <input type="checkbox"/> No            |
| <b>4a</b>   | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .  | <input type="checkbox"/> 4a  | <input type="checkbox"/> No            |
| <b>b</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? . . . . .  | <input type="checkbox"/> 4b  | <input type="checkbox"/> No            |

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

|  |   |           |           |  |
|--|---|-----------|-----------|--|
| <b>5a</b> During the year did the foundation pay or incur any amount to  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |           |           |  |
| (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>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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. . . . . | <input checked="" type="checkbox"/>                                 | <b>5b</b> | <b>No</b> |  |
| <b>c</b> 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? . . . . .  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |           |           |  |
| If "Yes," attach the statement required by Regulations section 53.4945–5(d).   |   |           |           |  |
| <b>6a</b> 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>6b</b> | <b>No</b> |  |
| <b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .  |   |           |           |  |
| If "Yes" to 6b, file Form 8870.  |   |           |           |  |
| <b>7a</b> 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>7b</b> | <b>No</b> |  |
| <b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .   |   |           |           |  |

**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<br><b>(If not paid, enter -0-)</b> | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---------------------------|---|---|---|---------------------------------------|
| See Additional Data Table |   |   |   |                                       |
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**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   |   |                  |   |                                       |
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| <b>Total</b> number of other employees paid over \$50,000. . . . . |   |                  | <input checked="" type="checkbox"/>                                   |                                       |

**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  |                     |                  |
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**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 | <b>Total</b> (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 | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4                       | 5  | 20,099,380 |
| 6 | <b>Minimum investment return.</b> 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  | <b>Distributable amount</b> 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   | 3a |           |
| a | Suitability test (prior IRS approval required). . . . .   | 3b |           |
| b | Cash distribution test (attach the required schedule). . . . .  | 4  | 1,198,055 |
| 4 | <b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4  | 5  |           |
| 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). . . . . | 6  | 1,198,055 |
| 6 | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .  |    |           |

**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)

|  | <b>(a)<br/>Corpus</b> | <b>(b)<br/>Years prior to 2008</b> | <b>(c)<br/>2008</b> | <b>(d)<br/>2009</b> |
|--|-----------------------|------------------------------------|---------------------|---------------------|
| <b>1</b> Distributable amount for 2009 from Part XI, line 7  |                       |                                    |                     | 991,152             |
| <b>2</b> Undistributed income, if any, as of the end of 2008   |                       |                                    |                     |                     |
| <b>a</b> Enter amount for 2008 only. . . . .   |                       |                                    |                     |                     |
| <b>b</b> Total for prior years 20____, 20____, 20____  |                       |                                    |                     |                     |
| <b>3</b> Excess distributions carryover, if any, to 2009   |                       |                                    |                     |                     |
| <b>a</b> From 2004. . . . .  | 332,137               |                                    |                     |                     |
| <b>b</b> From 2005. . . . .  | 344,881               |                                    |                     |                     |
| <b>c</b> From 2006. . . . .  | 304,498               |                                    |                     |                     |
| <b>d</b> From 2007. . . . .  | 223,950               |                                    |                     |                     |
| <b>e</b> From 2008. . . . .  | 430,900               |                                    |                     |                     |
| <b>f Total of lines 3a through e. . . . .</b>  | 1,636,366             |                                    |                     |                     |
| <b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ► \$ _____ 1,198,055  |                       |                                    |                     |                     |
| <b>a</b> Applied to 2008, but not more than line 2a  |                       |                                    |                     |                     |
| <b>b</b> Applied to undistributed income of prior years (Election required—see page 26 of the instructions)  |                       |                                    |                     |                     |
| <b>c</b> Treated as distributions out of corpus (Election required—see page 26 of the instructions). . . . .   | 0                     |                                    |                     |                     |
| <b>d</b> Applied to 2009 distributable amount. . . . .   |                       |                                    |                     | 991,152             |
| <b>e</b> Remaining amount distributed out of corpus  | 206,903               |                                    |                     |                     |
| <b>5</b> Excess distributions carryover applied to 2009<br>(If an amount appears in column (d), the same amount must be shown in column (a).)  |                       |                                    |                     |                     |
| <b>6</b> Enter the net total of each column as indicated below:  | 1,843,269             |                                    |                     |                     |
| <b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5   |                       |                                    |                     |                     |
| <b>b</b> Prior years' undistributed income Subtract line 4b from line 2b. . . . .  |                       |                                    |                     |                     |
| <b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . . |                       |                                    |                     |                     |
| <b>d</b> Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . . . .  |                       |                                    |                     |                     |
| <b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions . . . . .  |                       |                                    |                     |                     |
| <b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010. . . . .  |                       |                                    |                     | 0                   |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .                  |                       |                                    |                     |                     |
| <b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .  | 332,137               |                                    |                     |                     |
| <b>9</b> Excess distributions carryover to 2010.<br>Subtract lines 7 and 8 from line 6a . . . . .  | 1,511,132             |                                    |                     |                     |
| <b>10</b> Analysis of line 9   |                       |                                    |                     |                     |
| <b>a</b> Excess from 2005. . . . .   | 344,881               |                                    |                     |                     |
| <b>b</b> Excess from 2006. . . . .   | 304,498               |                                    |                     |                     |
| <b>c</b> Excess from 2007. . . . .   | 223,950               |                                    |                     |                     |
| <b>d</b> Excess from 2008. . . . .   | 430,900               |                                    |                     |                     |
| <b>e</b> Excess from 2009. . . . .   | 206,903               |                                    |                     |                     |

**Part XIV Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9)

|     |   |  |  |  |
|-----|---|--|--|--|
| 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. <input type="text"/> |  |  |  |
| b   | Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)                    |  |  |  |
| 2a  | Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.  |  |  |  |
| 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 organization had \$5,000 or more in assets at any time during the year—see page 27 of 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))

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

**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

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

The Lowell Berry Foundation  
3685 Mt Diablo Blvd Ste 269  
Lafayette, CA 94549

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

There is no standard request form required by the foundation. All applications for grant requests are submitted on applicant's form or letterhead

c Any submission deadlines

No deadline date required

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

Only restriction is that the applicant must be located in the State of California counties of Alameda or Contra Costa

**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)                        |   |                                |                                  |           |
| <b>a Paid during the year</b><br>See Additional Data Table |   |                                |                                  |           |
| <b>Total</b> . . . . .                                     |   |                                | ► 3a                             | 1,093,833 |
| <b>b Approved for future payment</b>                       |   |                                |                                  |           |
| <b>Total</b> . . . . .                                     |   |                                | ► 3b                             |           |

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

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

| Line No.<br>▼ | Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions.)   |
|---------------|---|
| 348 & 1       | THE LOWELL BERRY FOUNDATION IS PRIMARILY SUPPORTED BY INVESTMENT INCOME CONSISTING OF INTEREST, DIVIDENDS, AND CAPITAL GAINS. THE PURPOSE OF THE FOUNDATION IS TO DISTRIBUTE ITS INCOME IN A MANNER THAT WILL HELP PRESERVE THE CHRISTIAN TRADITION AND ASSIST LOCAL CHARITABLE ORGANIZATIONS WHICH HAVE PROVEN EFFECTIVE IN THEIR ASSISTANCE TO THE NEEDY SEGMENTS OF SOCIETY THROUGH EARNING INCOME FROM ITS VARIOUS INVESTMENTS, THE LOWELL BERRY FOUNDATION IS ABLE TO DISTRIBUTE IT TO THE ORGANIZATIONS DESCRIBED ABOVE, AND THEREFORE, ACHIEVE IT'S CHARITABLE PURPOSE |
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## 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

| <b>(a) Name and address</b>  | <b>(b) Title, and average hours per week devoted to position</b> | <b>(c) Compensation<br/>(If not paid, enter -0-)</b> | <b>(d) Contributions to employee benefit plans and deferred compensation</b> | <b>(e) Expense account, other allowances</b> |
|--|--|--|--|--|
| ANNETTE S ROBISON<br><br>3154 Lucas Drive<br>Lafayette, CA 94549   | Director<br>2 00   | 0  |  |  |
| JAYNE S MORDELL<br><br>40 Palmer Lane<br>Portola Valley, CA 94028  | Director<br>1 00   | 0  |  |  |
| JOHN ASHER<br><br>3175 Walnut Blvd<br>Walnut Creek, CA 94596       | DIRECTOR<br>3 00   | 0  |  |  |
| JAMIS KANE<br><br>314 Las Quebradas Lane<br>Alamo, CA 94507        | Director<br>2 00   | 0  |  |  |
| GARY L DEPOLO<br><br>37 CHARLES HILL CIRCLE<br>ORINDA, CA 94563    | Treasurer<br>5 00  | 0  |  |  |
| PATRICIA B CONKLIN<br><br>2361 BAY VIEW AVENUE<br>CARMEL, CA 93921 | Vice President<br>4 00   | 0  |  |  |
| BARBARA B CORNEILLE<br><br>112 LARK COURT<br>ALAMO, CA 94507       | Secretary<br>3 00  | 0  |  |  |
| LARRY R LANGDON<br><br>137 ASH LANE<br>PORTOLA VALLEY, CA 94028    | PRESIDENT<br>1 00  | 0  |  |  |

**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)  |   |                                |                                  |                  |
| <b>a Paid during the year</b>  |   |                                |                                  |                  |
| Young Womens Christian Assoc<br>2600 Bancroft Way<br>Berkeley, CA 94704              | Charitable  | 501(c)3                        | Youth Mentor Program             | 3,000            |
| WCC Salesian Boys & Girls Club<br>PO Box 6120<br>San Pablo, CA 94806                 | Charitable  | 501(c)3                        | Computer Tutor                   | 4,000            |
| Wardrobe for Opportunity<br>570 14th St Ste 5<br>Oakland, CA 94512                   | Charitable  | 501(c)3                        | Job Seeker Interviews            | 4,000            |
| Walnut Creek Education Foundation<br>960 Ygnacio Valley Rd<br>Walnut Creek, CA 94596 | Charitable  | 501(c)3                        | General Support                  | 2,000            |
| United Service Organizations Inc<br>211 Wilson Blvd Ste 1200<br>Arlington, VA 22201  | Charitable  | 501(c)3                        | General Support                  | 250              |
| Tri-Valley Baseball Academy<br>3574 Orella Way<br>Pleasanton, CA 94566               | Charitable  | 501(c)3                        | General Support                  | 2,875            |
| Super Stars Literacy Inc<br>675 Hegenburger Rd Ste 250<br>Oakland, CA 94621          | Charitable  | 501(c)3                        | General Support                  | 4,000            |
| Stanford Univ - Dept of Athletics<br>326 Galvez Street<br>Stanford, CA 94305         | Charitable  | 501(c)3                        | General Support                  | 17,000           |
| Sports 4 Kids<br>517 Fourth St<br>Oakland, CA 94607                                  | Charitable  | 501(c)3                        | General Support                  | 2,000            |
| Sophia Project<br>1724 Myrtle St<br>Oakland, CA 94607                                | Charitable  | 501(c)3                        | General Support                  | 3,000            |
| San Ramon Valley Ed Fnd<br>Alamo 100 Wilson Rd<br>Alamo, CA 94507                    | Charitable  | 501(c)3                        | Alamo & Stone Valley Sch Ed Fund | 1,175            |
| San Francisco Ballet<br>455 Franklin St<br>San Francisco, CA 94102                   | Charitable  | 501(c)3                        | General Support                  | 250              |
| St Elizabeth High School<br>1530 - 34th Ave<br>Oakland, CA 94601                     | Charitable  | 501(c)3                        | Y E S Team                       | 4,000            |
| PTA CA Congress of PTA<br>561 Merriewood Dr<br>Lafayette, CA 94549                   | Charitable  | 501(c)3                        | General Support                  | 1,800            |
| Placer Co Sheriffs Dept Search & Rescue<br>2929 Richardson Dr<br>Auburn, CA 95603    | Charitable  | 501(c)3                        | General Support                  | 250              |
| <b>Total . . . . .</b>   |   |                                | <b>► 3a</b>                      | <b>1,093,833</b> |

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| <b>a Paid during the year</b>   |   |                                |                                  |           |
| 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 Herman, 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 Retriever 7495 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     |
| FESCO 21455 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     |
| <b>Total . . . . .</b>  |   |                                |                                  | 1,093,833 |
|   |   |                                | <b>► 3a</b>                      |           |

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

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| <b>a Paid during the year</b>   |   |                                |                                  |                  |
| WellSpring PO Box 7384<br>Menlo Park, CA 94026  | Charitable  | 501(c)3                        | General Support                  | 2,500            |
| WEC International PO Box 1707<br>Fort Washington, PA 19034                            | Charitable  | 501(c)3                        | Plaster Family Fund/General Supp | 2,000            |
| WCPC Foundation 1801 Lacassie Ave<br>Walnut Creek, CA 94596                           | Charitable  | 501(c)3                        | Preparing a Place                | 10,000           |
| Walnut Creek Presbyterian Church<br>1801 Lacassie Ave<br>Walnut Creek, CA 94596       | Charitable  | 501(c)3                        | General Support                  | 2,000            |
| Transfiguration Episcopal Church<br>3900 Alameda de las Pulgas<br>San Mateo, CA 94403 | Charitable  | 501(c)3                        | General Support                  | 250              |
| Stanford University Medical Center<br>2700 San Hill Rd<br>Stanford, CA 94025          | Charitable  | 501(c)3                        | J Berry/Psych & Behvral          | 2,000            |
| Stanford University 326 Galvez St<br>Stanford, CA 94305                               | Charitable  | 501(c)3                        | Stanford Review                  | 250              |
| The Stanford Fund 326 Galvez St<br>Stanford, CA 94305                                 | Charitable  | 501(c)3                        | General Support                  | 250              |
| St Vincent De Paul - Farm Workers<br>3080 Rio Rd<br>Carmel, CA 93923                  | Charitable  | 501(c)3                        | Farm Workers Program             | 750              |
| St Stephens Episcopal Church 66 St<br>Stephens Dr<br>Orinda, CA 94563                 | Charitable  | 501(c)3                        | General Support                  | 5,000            |
| Shelter Outreach Plus PO Box 1340<br>Marina, CA 93933                                 | Charitable  | 501(c)3                        | General Support                  | 500              |
| San Ramon Valley Thunderbirds PO Box 490<br>San Ramon, CA 94583                       | Charitable  | 501(c)3                        | General Support                  | 1,000            |
| San Francisco Symphony Davies<br>Symphony Hall<br>San Francisco, CA 94102             | Charitable  | 501(c)3                        | General Support                  | 750              |
| San Francisco Opera Assoc 301 Van Ness Ave<br>San Francisco, CA 94102                 | Charitable  | 501(c)3                        | General Support                  | 500              |
| Punahou School 1601 Puahou St<br>Honolulu, HI 96822                                   | Charitable  | 501(c)3                        | General Support                  | 100              |
| <b>Total . . . . .</b>  |   |                                | <b>► 3a</b>                      | <b>1,093,833</b> |

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| <b>a Paid during the year</b>  |   |                                |                                  |                  |
| 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              |
| <b>Total . . . . .</b>   |   |                                | <b>► 3a</b>                      | <b>1,093,833</b> |

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| <b>a Paid during the year</b>  |   |                                |                                  |                  |
| 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            |
| VESTIA 30 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            |
| <b>Total . . . . .</b>   |   |                                | <b>► 3a</b>                      | <b>1,093,833</b> |

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

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| <b>a Paid during the year</b>  |   |                                |                                  |                  |
| Northern Light School3710 Doris Ave<br>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 Costa PO 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 Fullpower PO 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            |
| <b>Total . . . . .</b>   |   |                                | <b>► 3a</b>                      | <b>1,093,833</b> |

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| <b>a Paid during the year</b>   |   |                                |                                  |                  |
| 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 Project 2140 Dwight Way Berkeley, CA 94704                | Charitable  | 501(c)3                        | No Cnty Women                    | 2,000            |
| Bay Area Parent Leadership Action 405 - 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 Wheels 6955 Foothill Blvd Oakland, CA 94605               | Charitable  | 501(c)3                        | Senior Holiday Gifts             | 2,000            |
| <b>Total . . . . .</b>  |   |                                | <b>► 3a</b>                      | <b>1,093,833</b> |

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

## 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)  |   |                                |                                  |                  |
| <b>a Paid during the year</b>  |   |                                |                                  |                  |
| Faith Network of the East Bay Inc<br>2633 Telegraph Ave 409<br>Oakland, CA 94612 | Charitable  | 501(c)3                        | General Support                  | 25,000           |
| City Team Ministries PO Box 23833<br>Oakland, CA 94623                           | Charitable  | 501(c)3                        | General Support                  | 33,500           |
| Campus Crusade for Christ 1922<br>Grant St Apt 5<br>Berkeley, CA 94703           | Charitable  | 501(c)3                        | Berkeley Leaders                 | 7,000            |
| The Bay Area Urban Network 745 -<br>105th Ave<br>Oakland, CA 94603               | Charitable  | 501(c)3                        | General Support                  | 101,500          |
| Bay Area Rescue Mission 2114<br>Macdonald Ave<br>Richmond, CA 94802              | Charitable  | General Support                | Homeless Program                 | 10,000           |
| <b>Total . . . . .</b>   |   |                                | <b>► 3a</b>                      | <b>1,093,833</b> |

## 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

| <b>Description</b>  | <b>Beginning of Year - Book Value</b> | <b>End of Year - Book Value</b> |
|---------------------|---------------------------------------|---------------------------------|
| 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 |                       |                     |                                       |