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Form **990-PF**

Department of the Treasury  
Internal Revenue Service

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

OMB No 1545-0052

**2009**

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

For calendar year 2009, or tax year beginning 07/01, 2009, and ending 06/30, 2010

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 STELLA B. GROSS CHARITABLE TRUST C/O BANK OF THE WEST TRUST DEPARTMENT	A Employer identification number 23-7142181
	Number and street (or P O box number if mail is not delivered to street address) Room/suite P. O. BOX 1121	B Telephone number (see page 10 of the instructions) (408) 299-1657
	City or town, state, and ZIP code SAN JOSE, CA 95108	C If exemption application is pending, check here <input type="checkbox"/> D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>

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) ▶ \$ 6,286,959.

J Accounting method:  Cash  Accrual  
 Other (specify) \_\_\_\_\_ (Part I, column (d) must be on cash basis)

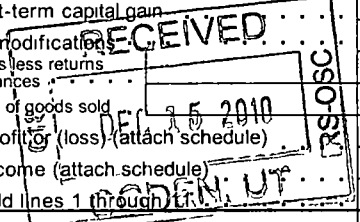
E If private foundation status was terminated under section 507(b)(1)(A), check here   
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

**Part I Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see 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)
--	------------------------------------	---------------------------	-------------------------	---

1 Contributions, gifts, grants, etc., received (attach schedule) . . . . .				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B. . . . .				
3 Interest on savings and temporary cash investments . . . . .	125,035	125,035		ATCH 2
4 Dividends and interest from securities . . . . .	72,695	72,695		ATCH 3
5a Gross rents . . . . .				
b Net rental income or (loss) . . . . .				
6a Net gain or (loss) from sale of assets not on line 10 . . . . .	-194,468			
b Gross sales price for all assets on line 6a . . . . .	1,622,503			
7 Capital gain net income (from Part IV, line 2) . . . . .				
8 Net short-term capital gain . . . . .				
9 Income modifications . . . . .				
10a Gross sales less returns and allowances . . . . .				
b Less Cost of goods sold . . . . .				
c Gross profit (or loss) (attach schedule) . . . . .				
11 Other income (attach schedule) . . . . .				
12 Total. Add lines 1 through 11 . . . . .	3,262	197,730		
13 Compensation of officers, directors, trustees, etc. . . . .	26,412			26,412
14 Other employee salaries and wages . . . . .				
15 Pension plans, employee benefits . . . . .				
16a Legal fees (attach schedule) . . . . .				
b Accounting fees (attach schedule) ATCH 4 . . . . .	15,145	7,708	0	7,707
c Other professional fees (attach schedule) . . . . .	45,102	45,102		
17 Interest . . . . .				
18 Taxes (attach schedule) (see page 14 of the instructions) * . . . .	6,146	35		
19 Depreciation (attach schedule) and depletion . . . . .				
20 Occupancy . . . . .				
21 Travel, conferences, and meetings . . . . .				
22 Printing and publications . . . . .				
23 Other expenses (attach schedule) . . . . .				
24 Total operating and administrative expenses. . . . .	92,805	52,845	0	34,119
Add lines 13 through 23 . . . . .	425,000			425,000
25 Contributions, gifts, grants paid . . . . .	517,805	52,845	0	459,119
26 Total expenses and disbursements Add lines 24 and 25 . . . . .				
27 Subtract line 26 from line 12 . . . . .	-514,543			
a Excess of revenue over expenses and disbursements . . . . .		144,885		
b Net investment income (if negative, enter -0-) . . . . .			-0-	
c Adjusted net income (if negative, enter -0-) . . . . .				

SCANNED Revenue DEC 17 2010



Operating and Administrative Expenses

Handwritten signature and date: 01/14

**Part II Balance Sheets**

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

	Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>				
1 Cash - non-interest-bearing . . . . .				
2 Savings and temporary cash investments . . . . .	327,203.	142,955.	142,955.	
3 Accounts receivable ▶ Less allowance for doubtful accounts ▶				
4 Pledges receivable ▶ Less allowance for doubtful accounts ▶				
5 Grants receivable . . . . .				
6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)				
7 Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶				
8 Inventories for sale or use . . . . .				
9 Prepaid expenses and deferred charges . . . . .				
10 a Investments - U S and state government obligations (attach schedule) **	1,261,691.	1,362,468.	1,452,080.	
b Investments - corporate stock (attach schedule) <u>ATCH 8</u>	3,797,828.	3,526,669.	3,391,029.	
c Investments - corporate bonds (attach schedule) <u>ATCH 9</u>	1,396,126.	1,233,130.	1,300,895.	
11 Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶				
12 Investments - mortgage loans . . . . .				
13 Investments - other (attach schedule) . . . . .				
14 Land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶				
15 Other assets (describe ▶ )				
16 <b>Total assets</b> (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . .	6,782,848.	6,265,222.	6,286,959.	
<b>Liabilities</b>				
17 Accounts payable and accrued expenses . . . . .				
18 Grants payable . . . . .				
19 Deferred revenue . . . . .				
20 Loans from officers, directors, trustees, and other disqualified persons . . . . .				
21 Mortgages and other notes payable (attach schedule) . . . . .				
22 Other liabilities (describe ▶ )				
23 <b>Total liabilities</b> (add lines 17 through 22) . . . . .				
<b>Net Assets or Fund Balances</b>				
<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>				
<b>and complete lines 24 through 26 and lines 30 and 31.</b>				
24 Unrestricted . . . . .				
25 Temporarily restricted . . . . .				
26 Permanently restricted . . . . .				
<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> ▶ <input checked="" type="checkbox"/>				
27 Capital stock, trust principal, or current funds . . . . .	5,413,584.	5,410,501.		
28 Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .				
29 Retained earnings, accumulated income, endowment, or other funds . . . . .	1,369,264.	854,721.		
30 <b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	6,782,848.	6,265,222.		
31 <b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	6,782,848.	6,265,222.		

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

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . .	1	6,782,848.
2 Enter amount from Part I, line 27a . . . . .	2	-514,543.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3 . . . . .	4	6,268,305.
5 Decreases not included in line 2 (itemize) ▶ <u>ATTACHMENT 10</u>	5	3,083.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	6,265,222.

\*\* ATCH 7

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE PART IV SCHEDULE			
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) . . . . .	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-194,468.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8. . . . .		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? . . . .  Yes  No  
 If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	434,674.	6,096,869.	0.071295
2007	582,393.	7,684,853.	0.075785
2006	506,317.	7,698,732.	0.065766
2005	478,844.	7,535,920.	0.063542
2004	441,085.	7,605,601.	0.057995
2	Total of line 1, column (d) . . . . .		0.334383
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . . . .		0.066877
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 . . . . .		6,517,852.
5	Multiply line 4 by line 3 . . . . .		435,894.
6	Enter 1% of net investment income (1% of Part I, line 27b) . . . . .		1,449.
7	Add lines 5 and 6 . . . . .		437,343.
8	Enter qualifying distributions from Part XII, line 4 . . . . . If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18		459,119.

**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 Date of ruling or determination letter _____ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .	1	1,449.
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	1,449.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .	4	0.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .	5	1,449.
6	<b>Credits/Payments</b>		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 . . . . .	6a	4,000.
b	Exempt foreign organizations-tax withheld at source . . . . .	6b	0.
c	Tax paid with application for extension of time to file (Form 8868) . . . . .	6c	0.
d	Backup withholding erroneously withheld . . . . .	6d	
7	Total credits and payments Add lines 6a through 6d . . . . .	7	4,000.
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached . . . . .	8	10.
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	2,541.
11	Enter the amount of line 10 to be <b>Credited to 2010 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/> . . . . .	11	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		X
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

**Part VII-A Statements Regarding Activities (continued)**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions) . . . . .		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? . . . . .		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . .	X	
Website address <input type="checkbox"/> N/A			
14	The books are in care of <input type="checkbox"/> BANK OF THE WEST Telephone no <input type="checkbox"/> 408-299-1657		
	Located at <input type="checkbox"/> P. O. BOX 1121, SAN JOSE, CA ZIP + 4 <input type="checkbox"/> 95108		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here . . . . . <input type="checkbox"/>		
	and enter the amount of tax-exempt interest received or accrued during the year . . . . . <input type="checkbox"/> 15		

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? . . . . . <input type="checkbox"/>	1b	X
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009? . . . . . <input type="checkbox"/>	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <input type="checkbox"/>		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see page 20 of the instructions) . . . . . <input type="checkbox"/>	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <input type="checkbox"/>		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009) . . . . . <input type="checkbox"/>	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . . <input type="checkbox"/>	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009? . . . . . <input type="checkbox"/>	4b	X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?  Yes  No

(3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)  Yes  No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b**   X  
 Organizations relying on a current notice regarding disaster assistance check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  Yes  No  
 If "Yes," attach the statement required by Regulations section 53.4945-5(d)

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b**   X  
 If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes  No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**   X

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

**1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATTACHMENT 11		26,412.	0.	0.

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

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

Total number of other employees paid over \$50,000  NONE

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

**3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."**

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

Total number of others receiving over \$50,000 for professional services . . . . . **NONE**

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See page 24 of the instructions 3 NONE	

Total. Add lines 1 through 3 . . . . .

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	6,366,925.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	250,184.
<b>c</b>	Fair market value of all other assets (see page 24 of the instructions)	<b>1c</b>	0.
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	6,617,109.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	6,617,109.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	<b>4</b>	99,257.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	6,517,852.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	325,893.

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

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	325,893.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	1,449.
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	1,449.
<b>3</b>	<b>Distributable amount before adjustments.</b> Subtract line 2c from line 1	<b>3</b>	324,444.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	324,444.
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	324,444.

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	459,119.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	0.
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	0.
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	0.
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	459,119.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	<b>5</b>	1,449.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	457,670.

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7 . . . . .				324,444.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only . . . . .				
b Total for prior years 20 07 20 06 20 05 . . . . .				
3 Excess distributions carryover, if any, to 2009				
a From 2004 . . . . .				0.
b From 2005 . . . . .				92,713.
c From 2006 . . . . .				120,881.
d From 2007 . . . . .				212,664.
e From 2008 . . . . .				133,799.
f Total of lines 3a through e . . . . .	560,057.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 459,119.				
a Applied to 2008, but not more than line 2a . . . . .				
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions) . . . . .				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions) . . . . .				
d Applied to 2009 distributable amount . . . . .				324,444.
e Remaining amount distributed out of corpus . . . . .	134,675.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5 . . . . .	694,732.			
b Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . .				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions . . . . .				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions . . . . .				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010. . . . .				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . . . . .	694,732.			
10 Analysis of line 9				
a Excess from 2005 . . . . .				92,713.
b Excess from 2006 . . . . .				120,881.
c Excess from 2007 . . . . .				212,664.
d Excess from 2008 . . . . .				133,799.
e Excess from 2009 . . . . .				134,675.

**Part XIV Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

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

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

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

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 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) )

NONE

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

NONE

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

Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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  
ATTACHMENT 12

b The form in which applications should be submitted and information and materials they should include  
NO SET FORMAT

c Any submission deadlines  
NONE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors  
ATTACHMENT 13

**Part XV Supplementary Information (continued)**

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SEE STATEMENT C				425,000.
<b>Total. . . . . ▶ 3a</b>				425,000.
b <i>Approved for future payment</i>				
<b>Total. . . . . ▶ 3b</b>				





**FORM 990-PF - PART IV  
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL CAPITAL GAIN DISTRIBUTIONS					306.	
		PART IV SCHEDULE					VAR 16,742.	VAR
		PART IV SCHEDULE					VAR -211,516.	VAR
TOTAL GAIN (LOSS) .....		.....					<u>-194,468.</u>	

ATTACHMENT 2

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
OTHER INTEREST INCOME	125,035.	125,035.
TOTAL	<u>125,035.</u>	<u>125,035.</u>

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
DIVIDEND INCOME	72,695.	72,695.
TOTAL	<u>72,695.</u>	<u>72,695.</u>

ATTACHMENT 4

FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
ACCOUNTING FEES	15,145.	7,708.	7,707.	
TOTALS	<u>15,145.</u>	<u>7,708.</u>	<u>0.</u>	<u>7,707.</u>

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
TRUSTEE FEES	45,102.	45,102.
TOTALS	<u>45,102.</u>	<u>45,102.</u>

FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
FEDERAL TAXES PAID	6,111.	
FTB FILING FEE	10.	10.
AG REGISTRY FILING FEE	25.	25.
TOTALS	<u>6,146.</u>	<u>35.</u>

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

ATTACHMENT 7

DESCRIPTION

<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
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SEE ATTACHED STATEMENT A	1,362,468.	1,452,080.
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US OBLIGATIONS TOTAL	<u>1,362,468.</u>	<u>1,452,080.</u>
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FORM 990PF, PART II - CORPORATE BONDS

ATTACHMENT 9

DESCRIPTION

<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
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SEE ATTACHED STATEMENT A	1,233,130.	1,300,895.
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TOTALS

	<u>1,233,130.</u>	<u>1,300,895.</u>
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ATTACHMENT 10FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

<u>DESCRIPTION</u>	<u>AMOUNT</u>
UNREALIZED LOSS ON INVESTMENTS	3,083.
TOTAL	<u>3,083.</u>

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 11

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
LOUIS O'NEAL P. O. BOX 1121 SAN JOSE, CA 95108	DIRECTOR 1.00	26,412.	0.	0.
ARTHUR K. LUND P. O. BOX 1121 SAN JOSE, CA 95108	DIRECTOR 1.00	0.	0.	0.
JUDGE THOMAS P. HANSEN P. O. BOX 1121 SAN JOSE, CA 95108	DIRECTOR 1.00	0.	0.	0.
JEFFREY O'NEAL P. O. BOX 1121 SAN JOSE, CA 95108	DIRECTOR 1.00	0.	0.	0.
GRAND TOTALS		26,412.	0.	0.

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

C/O BANK OF THE WEST  
P. O. BOX 1121  
SAN JOSE, CA 95108  
408-299-1657

990PF, PART XV - RESTRICTIONS OR LIMITATIONS ON AWARDS

ORGANIZATIONS MUST BE EXEMPT FROM TAX UNDER IRC SEC. 501(C)(3) AND  
BE LOCATED IN SANTA CLARA COUNTY, CALIFORNIA

**SCHEDULE D  
(Form 1041)**

# Capital Gains and Losses

OMB No 1545-0092

## 2009

Department of the Treasury  
Internal Revenue Service

▶ **Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for  
Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).**

Name of estate or trust **STELLA B. GROSS CHARITABLE TRUST**  
C/O BANK OF THE WEST TRUST DEPARTMENT

Employer identification number  
**23-7142181**

**Note:** Form 5227 filers need to complete *only* Parts I and II

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
<b>1a</b>					

<b>b</b> Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b . . . . .	<b>1b</b>	16,742
<b>2</b> Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 . . . . .	<b>2</b>	
<b>3</b> Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	<b>3</b>	
<b>4</b> Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet . . . . .	<b>4</b>	( )
<b>5</b> <b>Net short-term gain or (loss).</b> Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back . . . . . ▶	<b>5</b>	16,742

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
<b>6a</b>					

<b>b</b> Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b . . . . .	<b>6b</b>	-211,516
<b>7</b> Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 . . . . .	<b>7</b>	
<b>8</b> Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	<b>8</b>	
<b>9</b> Capital gain distributions . . . . .	<b>9</b>	306.
<b>10</b> Gain from Form 4797, Part I . . . . .	<b>10</b>	
<b>11</b> Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet . . . . .	<b>11</b>	( )
<b>12</b> <b>Net long-term gain or (loss).</b> Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back . . . . . ▶	<b>12</b>	-211,210

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2009

<b>Part III Summary of Parts I and II</b> <i>Caution: Read the instructions before completing this part</i>		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
<b>13</b>	Net short-term gain or (loss)			16,742.
<b>14</b>	Net long-term gain or (loss):			
<b>a</b>	Total for year	<b>14a</b>		-211,210
<b>b</b>	Unrecaptured section 1250 gain (see line 18 of the wrksht)	<b>14b</b>		
<b>c</b>	28% rate gain	<b>14c</b>		
<b>15</b>	Total net gain or (loss). Combine lines 13 and 14	<b>15</b>		-194,468

**Note:** If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary

<b>Part IV Capital Loss Limitation</b>		
<b>16</b>	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of	
<b>a</b>	The loss on line 15, column (3) or <b>b</b> \$3,000	<b>16</b> ( 3,000 )

**Note:** If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover

**Part V Tax Computation Using Maximum Capital Gains Rates**

**Form 1041 filers.** Complete this part only if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

**Caution:** Skip this part and complete the worksheet on page 8 of the instructions if

- Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

**Form 990-T trusts.** Complete this part only if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero

<b>17</b>	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)	<b>17</b>	
<b>18</b>	Enter the smaller of line 14a or 15 in column (2) but not less than zero	<b>18</b>	
<b>19</b>	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	<b>19</b>	
<b>20</b>	Add lines 18 and 19	<b>20</b>	
<b>21</b>	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0-	<b>21</b>	
<b>22</b>	Subtract line 21 from line 20 If zero or less, enter -0-	<b>22</b>	
<b>23</b>	Subtract line 22 from line 17 If zero or less, enter -0-	<b>23</b>	
<b>24</b>	Enter the smaller of the amount on line 17 or \$2,300	<b>24</b>	
<b>25</b>	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26; go to line 27 and check the "No" box. <input type="checkbox"/> No. Enter the amount from line 23.	<b>25</b>	
<b>26</b>	Subtract line 25 from line 24	<b>26</b>	
<b>27</b>	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22	<b>27</b>	
<b>28</b>	Enter the amount from line 26 (If line 26 is blank, enter -0-)	<b>28</b>	
<b>29</b>	Subtract line 28 from line 27	<b>29</b>	
<b>30</b>	Multiply line 29 by 15% (.15)	<b>30</b>	
<b>31</b>	Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	<b>31</b>	
<b>32</b>	Add lines 30 and 31	<b>32</b>	
<b>33</b>	Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	<b>33</b>	
<b>34</b>	Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	<b>34</b>	





FEDERAL FOOTNOTES

THE STELLA B. GROSS CHARITABLE TRUST PAID LOUIS O'NEAL ATTORNEY FEES OF \$26,412 FOR LEGAL SERVICES RENDERED TO THE TRUSTEE. THE LEGAL SERVICES INCLUDE: REVIEWING REQUESTS FOR FUNDS, INVESTIGATING ORGANIZATIONS MAKING REQUESTS, ADVISING THE TRUSTEE IN ALL LEGAL MATTERS RELATING TO THE ADMINISTRATION OF THE TRUST, PREPARING NOTICES REQUIRED TO BE GIVEN BY THE TRUSTEE, REVIEWING THE ANNUAL ACCOUNT AND REPORT OF TRUSTEE AND THE REPORTS OF THE CERTIFIED PUBLIC ACCOUNTANT, PREPARING ALL WAIVERS, CONSENTS, NOTIFICATIONS TO TRUSTEE, AND THE MINUTES FOR THE ADVISORY COMMITTEE OF THE TRUST, AND PREPARING ALL LETTERS OF TRANSMITTAL FROM THE TRUSTEE TO EACH ORGANIZATION FOR WHICH THE ADVISORY COMMITTEE HAD AUTHORIZED A DISTRIBUTION OF FUNDS.

ASSET POSITION  
AS OF 06/30/10

STELLA B GROSS CHARITABLE TRUST

UNITS	ASSET DESCRIPTION	CARRYING VALUE	MARKET VALUE
EQUITY INVESTMENTS			
COMMON STOCKS			
CONSUMER DISCRETIONARY			
418	BEST BUY INC COM	12,592 25	14,153 48
485	COMCAST CORP CL A	7,972 38	8,424 45
591	DIRECTV COM CL A	19,984 90	20,046 72
800	MCDONALDS CORP COM	15,553 00	52,696 00
580	TARGET CORP COM	17,267 94	28,518 60
	TOTAL CONSUMER DISCRETIONARY	73,370 47	123,839.25
CONSUMER STAPLES			
624	AVON PRODS INC COM	18,986 70	16,536 00
572	GENERAL MILLS INC COM	20,624 58	20,317 44
700	PEPSICO INC COM	36,365 00	42,665 00
420	PHILIP MORRIS INTL INC COM	20,680 25	19,252 80
603	PROCTER & GAMBLE CO COM	36,453 28	36,167 94
650	WAL MART STORES INC COM	32,313 48	31,245 50

ASSET POSITION  
AS OF 06/30/10

STELLA B GROSS CHARITABLE TRUST

UNITS	ASSET DESCRIPTION	CARRYING VALUE	MARKET VALUE
	TOTAL CONSUMER STAPLES	165,423 29	166,184 68
	ENERGY		
400	APACHE CORP COM	17,944 00	33,676 00
600	BAKER HUGHES INC COM	38,096.60	24,942 00
228	DIAMOND OFFSHORE DRILLING INC COM	19,883 08	14,179 32
414	EXXON MOBIL CORP COM	18,278 10	23,626 98
369	MURPHY OIL CORP COM	19,175.38	18,283.95
795	NATIONAL OILWELL VARCO INC	27,482 28	26,290 65
450	OCCIDENTAL PETE CORP COM	39,064 46	34,717 50
	TOTAL ENERGY	179,923 90	175,716 40
	FINANCIALS		
640	AFLAC INC COM	22,407 10	27,308 80
1,841	FIFTH THIRD BANCORP COM	22,699 53	22,625 89
104	GOLDMAN SACHS GROUP INC COM	19,005 86	13,652 08
312	INTERCONTINENTALEXCHANGE INC COM	34,253 81	35,265 36
1,253	INVESCO LTD	19,157 12	21,087 99
500	PRUDENTIAL FINL INC COM	16,398 12	26,830 00

ASSET POSITION  
AS OF 06/30/10

STELLA B GROSS CHARITABLE TRUST

UNITS	ASSET DESCRIPTION	CARRYING VALUE	MARKET VALUE
1,056	SUNTRUST BKS INC COM	16,716 17	24,604 80
900	WELLS FARGO & CO NEW COM	20,867 86	23,040 00
	TOTAL FINANCIALS	171,505 57	194,414 92
	HEALTH CARE		
570	ABBOTT LABORATORIES COM	29,524 63	26,664 60
480	BIOGEN IDEC INC COM	32,798 34	22,776 00
294	CELGENE CORP COM	17,522 66	14,941 08
614	EXPRESS SCRIPTS INC COM	19,480 22	28,870 28
644	GILEAD SCIENCES INC COM	29,856.91	22,076 32
425	MCKESSON CORP COM	27,454 41	28,543 00
400	MEDTRONIC INC COM	18,382 32	14,508.00
1,104	MYLAN LABS INC COM	14,650 74	18,812 16
256	STRYKER CORP COM	16,667 78	12,815 36
460	WELLPOINT INC COM	22,014 13	22,507 80
	TOTAL HEALTH CARE	228,352 14	212,514 60
	INDUSTRIALS		
528	DANAHER CORP COM	18,335 68	19,599 36

ASSET POSITION  
AS OF 06/30/10

STELLA B GROSS CHARITABLE TRUST

UNITS	ASSET DESCRIPTION	CARRYING VALUE	MARKET VALUE
480	EMERSON ELEC CO COM	22,959 79	20,971 20
250	FEDEX CORP COM	11,825 00	17,527 50
185	FLOWSERVE CORP COM	13,072.30	15,688 00
960	GENERAL ELEC CO COM	9,187 20	13,843.20
372	ITT CORP NEW COM	15,233 40	16,710.24
454	PALL CORP COM	17,881 56	15,603.98
159	PRECISION CASTPARTS CORP COM	12,872 80	16,364.28
500	UNITED TECHNOLOGIES CORP COM	34,292 60	32,455.00
137	3M CO COM	10,960 42	10,821 63
	TOTAL INDUSTRIALS	166,620 75	179,584 39
	INFORMATION TECHNOLOGY		
1,182	ALTERA CORP COM	21,330 93	29,325 42
300	APPLE INC COM	41,673 44	75,459 00
1,700	CISCO SYS INC COM	75,189 72	36,227.00
700	COGNIZANT TECH SOLUTIONS CRP COM	18,738 93	35,042.00
791	E M C CORP MASS COM	13,929 51	14,475 30
86	GOOGLE INC CL A	44,979 23	38,265.70
425	HEWLETT PACKARD CO COM	1,892 65	18,394.00

ASSET POSITION  
AS OF 06/30/10

STELLA B GROSS CHARITABLE TRUST

UNITS	ASSET DESCRIPTION	CARRYING VALUE	MARKET VALUE
1,618	INTEL CORP COM	20,961 31	31,470 10
74	MASTERCARD INC CL A	12,711 60	14,765 22
1,427	ORACLE CORP COM	27,072 19	30,623 42
	TOTAL INFORMATION TECHNOLOGY	278,479 51	324,047 16
	MATERIALS		
250	ALLEGHENY TECHNOLOGIES INC COM	16,713 25	11,047.50
750	DU PONT E I DE NEMOURS & CO COM	36,296 03	25,942 50
417	ECOLAB INC COM	17,637 81	18,727.47
	TOTAL MATERIALS	70,647 09	55,717 47
	TELECOMMUNICATION SERVICES		
300	AMERICAN TOWER CORP CL A	10,609 39	13,350 00
1,200	AT&T INC COM	38,981 30	29,028 00
	TOTAL TELECOMMUNICATION SERVICES	49,590 69	42,378 00
	UTILITIES		
779	EXELON CORP COM	58,962 59	29,578 63
300	NEXTERA ENERGY INC COM	14,974 77	14,628.00

ASSET POSITION  
AS OF 06/30/10

STELLA B. GROSS CHARITABLE TRUST

UNITS	ASSET DESCRIPTION	CARRYING VALUE	MARKET VALUE
	TOTAL UTILITIES	73,937 36	44,206.63
	TOTAL COMMON STOCKS	1,457,850 77	1,518,603 50
	EQUITY FUNDS		
12,781 434	ACCESSOR SMALL TO MID CAP FUND-INSTL	396,293 99	300,235 88
35,070 621	ACCESSOR STRATEGIC ALTERNATIVES FUND INSTL	410,000 00	369,293.64
24,354 603	JP MORGAN EMERGING MARKETS EQUITY FUND - INS	500,000 00	480,272.77
23,601 577	MFS INSTITUTIONAL EQUITY FD #403	468,729 71	342,930 91
12,702 095	MFS INTL NEW DISCOVERY FUND INSTL	192,219 97	224,700 06
1,200	SPDR S&P MIDCAP 400 ETF TR UNIT SER 1 STANDARD & POORS DEP RCPT	101,574 96	154,992 00
	TOTAL EQUITY FUNDS	2,068,818 63	1,872,425 26
	TOTAL EQUITY INVESTMENTS	3,526,669 40	3,391,028 76
	FIXED INCOME INVESTMENTS		
	TREASURY & GOVERNMENT SECURITIES		

ASSET POSITION  
AS OF 06/30/10

STELLA B GROSS CHARITABLE TRUST

UNITS	ASSET DESCRIPTION	CARRYING VALUE	MARKET VALUE
	SHORT (LESS THAN 5 YEARS)		
100,000	FEDERAL HOME LOAN BKS CONS BDS 4 875% DTD 11/03/2005 DUE 12/14/2012	104,036 00	109,547 00
200,000	FEDERAL FARM CR BKS CONS SYSTEMWIDE BDS 4.50% DTD 09/06/2005 DUE 05/06/2014	203,500 00	222,000 00
100,000	FEDERAL HOME LN MTG CORP DEB 5 125% DTD 07/16/2002 DUE 07/15/2012	104,110 00	109,093 50
	TOTAL SHORT (LESS THAN 5 YEARS)	411,646 00	440,640 50
	MEDIUM (5-10 YEARS)		
200,000	FEDERAL HOME LN BKS CONS BDS 5 50% DTD 11/05/2001 DUE 08/15/2016	212,356 00	233,438 00
150,000	FEDERAL HOME LOAN BKS CONS BDS STEP CPN DTD 03/30/2010 DUE 03/30/2016 CALLABLE	150,000 00	151,992 00
200,000	FEDERAL FARM CR BKS CONS SYSTEMWIDE BDS 5.05% DTD 05/18/2007 DUE 05/18/2017	206,414 00	229,656 00
	TOTAL MEDIUM (5-10 YEARS)	568,770 00	615,086 00
	LONG (OVER 10 YEARS)		

ASSET POSITION  
AS OF 06/30/10

STELLA B GROSS CHARITABLE TRUST

UNITS	ASSET DESCRIPTION	CARRYING VALUE	MARKET VALUE
176,429.710	SMALL BUSINESS ADMIN GTD LN POOL CTFS 5.54% DTD 09/13/2006 DUE 09/01/2026	186,684.68	193,714.53
185,401.920	SMALL BUSINESS ADMIN GTD LN POOL CTFS 5.37% DTD 04/16/2008 DUE 04/01/2028	195,367.28	202,638.74
	TOTAL LONG (OVER 10 YEARS)	382,051.96	396,353.27
	TOTAL TREASURY & GOVERNMENT SECURITIES	1,362,467.96	1,452,079.77
	CORPORATE BONDS		
	SHORT (LESS THAN 5 YEARS)		
125,000	AT&T INC NT 6.70% DTD 11/17/2008 DUE 11/15/2013 CALLABLE	135,236.25	144,260.00
150,000	HEWLETT PACKARD CO GBLB NT 4.75% DTD 02/26/2009 DUE 06/02/2014 CALLABLE	150,423.00	166,198.50
150,000	PHILIP MORRIS INTL INC NT 4.875% DTD 05/16/2008 DUE 05/16/2013 NON-CALLABLE	152,238.00	162,229.50
	TOTAL SHORT (LESS THAN 5 YEARS)	437,897.25	472,688.00

ASSET POSITION  
AS OF 06/30/10

STELLA B. GROSS CHARITABLE TRUST

UNITS	ASSET DESCRIPTION	CARRYING VALUE	MARKET VALUE
	MEDIUM (5-10 YEARS)		
120,000	ABBOTT LABS NT 5 875% DTD 05/12/2006 DUE 05/15/2016 CALLABLE	129,999 60	140,386 80
100,000	AMERICAN EXPRESS CO 7 00% DTD 03/19/2008 DUE 03/19/2018	112,319 00	115,339 00
100,000	AMERITECH CAP FUNDING CORP DEB 6 45% DTD 01/21/1998 DUE 01/15/2018 NON-CALLABLE	107,437 00	112,391 00
100,000	PHILLIPS PETE CO DEB 6 65% DTD 07/06/1998 DUE 07/15/2018 CALLABLE	105,558 00	119,096 00
	TOTAL MEDIUM (5-10 YEARS)	455,313 60	487,212 80
	TOTAL CORPORATE BONDS	893,210 85	959,900 80
	FIXED INCOME FUNDS		
35,818.674	FEDERATED INSTITUTIONAL HIGH YIELD BOND FUND #900	339,919 22	340,993 78
	TOTAL FIXED INCOME FUNDS	339,919 22	340,993 78
	TOTAL FIXED INCOME INVESTMENTS	2,595,598 03	2,752,974 35

FROM 07/01/2009  
TO 06/30/2010

BANK OF THE WEST  
STATEMENT OF CAPITAL GAINS AND LOSSES  
STELLA B. GROSS CHARITABLE TRUST

TRUST YEAR ENDING 06/30/2010

TAX PREPARER: OTA  
TRUST ADMINISTRATOR: MWB  
INVESTMENT OFFICER: PLD

LEGEND: F - FEDERAL S - STATE I - INHERITED  
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
190.0000 ABBOTT LABORATORIES COM - 002824100 - MINOR = 482						
SOLD		02/26/2010	10309.48			
ACQ	160.0000	02/20/2009	8681.67	8715.20	-33.53	LT15
	30.0000	05/09/2008	1627.81	1553.93	73.88	LT15
161.0000 AIR PRODS & CHEMS INC COM - 009158106 - MINOR = 406						
SOLD		02/26/2010	11037.65			
ACQ	161.0000	05/18/2009	11037.65	10358.87	678.78	ST
175000.0000 ANHEUSER BUSCH NT DTD 04/14/99 5.750% DUE 04/01/10 - 035229CD3 - MINOR = 210						
SOLD		04/01/2010	175000.00			
ACQ	175000.0000	08/01/2002	175000.00	184385.25	-9385.25	LT15
375.0000 BMC SOFTWARE INC COM - 055921100 - MINOR = 487						
SOLD		02/26/2010	13764.91			
ACQ	375.0000	05/09/2008	13764.91	13225.39	539.52	LT15
210.0000 BARD C R INC COM - 067383109 - MINOR = 479						
SOLD		02/26/2010	17560.90			
ACQ	170.0000	05/09/2008	14215.97	15528.31	-1312.34	LT15
	40.0000	02/20/2009	3344.93	3425.20	-80.27	LT15
750.0000 CVS CAREMARK CORP COM - 126650100 - MINOR = 461						
SOLD		02/26/2010	25314.88			
ACQ	750.0000	02/20/2009	25314.88	21607.50	3707.38	LT15
250.0000 DISNEY WALT CO COM - 254687106 - MINOR = 445						
SOLD		02/26/2010	7756.88			
ACQ	250.0000	02/20/2009	7756.88	4346.00	3410.88	LT15
256.0000 EXPEDITORS INTL WASH INC COM - 302130109 - MINOR = 411						
SOLD		02/26/2010	9331.08			
ACQ	256.0000	05/18/2009	9331.08	8413.52	917.56	ST
366.0000 EXXON MOBIL CORP COM - 30231G102 - MINOR = 464						
SOLD		02/26/2010	23808.22			
ACQ	150.0000	02/20/2009	9757.47	10693.50	-936.03	LT15
	216.0000	09/27/2000	14050.75	9536.40	4514.35	LT15
3344.7680 ACCESSOR SMALL TO MID CAP FUND-INSTL - 349913376 - MINOR = 574						
SOLD		12/08/2009	78000.00			
ACQ	3344.7680	04/24/2007	78000.00	103706.01	-25706.01	LT15
250.0000 GAMESTOP CORP NEW CL A - 36467W109 - MINOR = 451						
SOLD		02/26/2010	4309.25			
ACQ	250.0000	02/20/2009	4309.25	6515.00	-2205.75	LT15
240.0000 GENERAL ELEC CO COM - 369604103 - MINOR = 416						
SOLD		02/26/2010	3835.15			
ACQ	240.0000	02/20/2009	3835.15	2296.80	1538.35	LT15
48979.7140 GOLDMAN SACHS HIGH YIELD FD #527 - 38141W679 - MINOR = 592						
SOLD		12/17/2009	339919.22			
ACQ	48979.7140	10/04/2007	339919.22	387263.24	-47344.02	LT15
278.0000 JACOBS ENGR GROUP INC COM - 469814107 - MINOR = 413						
SOLD		02/26/2010	10772.20			
ACQ	278.0000	05/18/2009	10772.20	11091.78	-319.58	ST
21606.8170 MFS INSTITUTIONAL EQUITY FD #403 - 552966806 - MINOR = 572						
SOLD		12/08/2009	355000.00			
ACQ	21606.8170	12/13/2007	355000.00	429113.58	-74113.58	LT15
10735.3730 MFS INTL NEW DISCOVERY FUND INSTL - 552981854 - MINOR = 572						
SOLD		12/08/2009	200000.00			
ACQ	10735.3730	12/13/2007	200000.00	265172.04	-65172.04	LT15
637.0000 MICROCHIP TECHNOLOGY INC COM - 595017104 - MINOR = 490						
SOLD		02/26/2010	17117.37			
ACQ	637.0000	05/18/2009	17117.37	13213.99	3903.38	ST
500.0000 NYSE EURONEXT COM - 629491101 - MINOR = 471						
SOLD		02/26/2010	13195.23			
ACQ	250.0000	05/09/2008	6597.62	17781.50	-11183.89	LT15
	211.0000	10/08/2008	5568.39	6205.24	-636.85	LT15
	39.0000	02/20/2009	1029.23	689.13	340.10	LT15
300.0000 NIKE INC CL B - 654106103 - MINOR = 440						
SOLD		02/26/2010	20176.93			
ACQ	300.0000	05/09/2008	20176.93	19363.74	813.19	LT15
559.0000 NOBLE ENERGY INC COM - 655044105 - MINOR = 467						
SOLD		02/26/2010	40450.46			
ACQ	559.0000	05/18/2009	40450.46	30658.19	9792.27	ST
297.0000 PROCTER & GAMBLE CO COM - 742718109 - MINOR = 457						
SOLD		02/26/2010	18804.52			
ACQ	297.0000	01/18/2008	18804.52	19981.74	-1177.22	LT15
11845.5300 SMALL BUSINESS ADMIN GTD LN POOL CTFS 5.54% DTD 09/13/2006 DUE - 83162CQNG - MINOR = 064						
SOLD		09/01/2009	11845.53			
ACQ	11845.5300	02/24/2009	11845.53	12534.05	-688.52	ST
10740.6000 SMALL BUSINESS ADMIN GTD LN POOL CTFS 5.54% DTD 09/13/2006 DUE - 83162CQNG - MINOR = 064						
SOLD		03/01/2010	10740.60			
ACQ	10740.6000	02/24/2009	10740.60	11364.90	-624.30	LT15
9930.2800 SMALL BUSINESS ADMIN GTD LN POOL CTFS 5.37% DTD 04/16/2008 DUE - 83162CRS4 - MINOR = 064						
SOLD		10/01/2009	9930.28			
ACQ	9930.2800	02/24/2009	9930.28	10464.03	-533.75	ST
14101.8400 SMALL BUSINESS ADMIN GTD LN POOL CTFS 5.37% DTD 04/16/2008 DUE - 83162CRS4 - MINOR = 064						
SOLD		04/01/2010	14101.84			
ACQ	14101.8400	02/24/2009	14101.84	14859.81	-757.97	LT15
351.0000 SUNTRUST BKS INC COM - 867914103 - MINOR = 469						
SOLD		02/26/2010	8281.81			
ACQ	300.0000	02/20/2009	7078.47	1965.00	5113.47	LT15
	51.0000	05/18/2009	1203.34	807.31	396.03	ST

FROM 07/01/2009  
TO 06/30/2010

BANK OF THE WEST  
STATEMENT OF CAPITAL GAINS AND LOSSES  
STELLA B. GROSS CHARITABLE TRUST

TRUST YEAR ENDING 06/30/2010

TAX PREPARER: OTA  
TRUST ADMINISTRATOR: MWB  
INVESTMENT OFFICER: PLD

LEGEND: F - FEDERAL S - STATE I - INHERITED  
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
150000 0000 WALGREEN CO SR NT 5.25% DTD 01/13/2009 DUE 01/15/2019 - 931422AE9 - MINOR = 210						
SOLD		03/16/2010	160125.00			
ACQ	150000 0000	02/25/2009	160125 00	151023.00	9102.00	LT15
616 0000 INVESCO LTD - G491BT108 - MINOR = 469						
SOLD		02/26/2010	12014.06			
ACQ	616 0000	05/18/2009	12014 06	9418 02	2596.04	ST
TOTALS			1622503.45	1817277.17		

SUMMARY OF CAPITAL GAINS/LOSSES

FEDERAL	SHORT TERM	LONG TERM 28%	LONG TERM 15%	ST WASH SALE	LT WASH SALE	1250 GAIN
SUBTOTAL FROM ABOVE	16742 21	0.00	-211515.93	0.00	0.00	0.00*
COMMON TRUST FUND	0 00	0.00	0 00			0.00
CAPITAL GAIN DIVIDENDS	0.00	0.00	306.00			0.00
	16742 21	0.00	-211209.93	0.00	0.00	0.00
STATE						
SUBTOTAL FROM ABOVE	16742.21	0.00	-211515.93	0 00	0.00	0.00*
COMMON TRUST FUND	0.00	0.00	0.00			0.00
CAPITAL GAIN DIVIDENDS	0.00	0.00	306.00			0.00
	16742.21	0.00	-211209.93	0.00	0.00	0.00

\* - 1250 GAIN DETAILED ON TRANS PAGES, NOT ABOVE

STELLA B GROSS CHARITABLE TRUST  
 FYE JUNE 30, 2010  
 FORM 990FP, PART XV- GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME	ADDRESS	CITY	STATE	ZIP	RELATIONSHIP TO		FOUNDATION STATUS OF		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
					SUBSTANTIAL CONTRIBUTOR	RECIPIENT				
2ND CHANCE 4 PETS	1484 POLLARD ROAD, NO 444	LOS GATOS	CA	95032	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,000	
ACCESS	2425 SAMARITAN DRIVE	SAN JOSE	CA	95124	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000	
AMERICAN BEETHOVEN SOCIETY	1 WASHINGTON SQUARE	SAN JOSE	CA	95192	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,500	
ASCENT EMPLOYMENT PROGRAM	4911 MOORPARK AVE	SAN JOSE	CA	95129	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000	
BELLMINE COLLEGE PREPARATORY	960 W HEDDING STREET	SAN JOSE	CA	95126	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000	
BOY SCOUTS OF AMERICA	970 W JULIAN ST	SAN JOSE	CA	95126	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000	
BOYS & GIRLS CLUBS OF SILICON VALLEY	255 WEST JULIAN ST , SUITE 200	SAN JOSE	CA	95110	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000	
CALIFORNIA HISTORY CENTER & FOUNDATION	21250 STEVENS CREEK BLVD	CUPERTINO	CA	95014	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	12,500	
CAMP OKIZU FOUNDATION	16 DIGITAL DRIVE	NOVATO	CA	94949	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	9,167	
CATHOLIC CHARITIES	2625 ZANKER ROAD, #200	SAN JOSE	CA	95134	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	20,000	
CHILD ADVOCATES OF SILICON VALLEY	509 VALLEY WAY	MILPITAS	CA	95035	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	12,500	
CLARA BARTON SOCIETY	2731 NORTH FIRST STREET	SAN JOSE	CA	95134	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000	
DELTA UPSILON EDUCATION FOUNDATION	170 SOUTH MARKET ST	SAN JOSE	CA	95113	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	20,000	
DOWNTOWN COLLEGE PREPARATORY	1460 THE ALAMEDA	SAN JOSE	CA	95126	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000	
FRIENDS OF GUADALUPE RIVER PARKS AND GARDENS	438 COLEMAN AVENUE	SAN JOSE	CA	95110	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,500	
HABITAT FOR HUMANITY	513 VALLEY WAY	MILPITAS	CA	95035	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,500	
HISTORY OF SAN JOSE	1650 SENTER ROAD	SAN JOSE	CA	95112	NONE	PUBLIC	ORGANIZATION'S EXEMPT PURPOSE	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	11,500	

<u>RECIPIENT NAME</u>	<u>ADDRESS</u>	<u>CITY</u>	<u>STATE</u>	<u>ZIP</u>	<u>RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR</u>	<u>FOUNDATION STATUS OF RECIPIENT</u>	<u>PURPOSE OF GRANT OR CONTRIBUTION</u>	<u>AMOUNT</u>
HOOPER INSTITUTION	STANFORD UNIVERSITY	STANFORD	CA	94305-6010	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
HOPE SERVICES	30 LAS COLLINAS LANE	SAN JOSE	CA	95119	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	7,500
HOSPICE OF THE VALLEY	4850 UNION AVENUE	SAN JOSE	CA	95124	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
INNVISION OF SANTA CLARA VALLEY	974 WILLOW ST	SAN JOSE	CA	95125	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
JOHN XXIII CENTER	2625 ZANKER ROAD, #200	SAN JOSE	CA	95134	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
JOINT VENTURE SILICON	60 SOUTH MARKET STREET, STE 1000	SAN JOSE	CA	95113	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
LOAVES AND FISHES FAMILY KITCHEN	508 VALLEY WAY	MILPITAS	CA	95035	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
MINETA TRANSPORTATION INSTITUTE	210 NORTH 4TH STREET, 4TH FLOOR	SAN JOSE	CA	95112	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,500
MULTIPLE SCLEROSIS SOCIETY	2589 SCOTT BLVD	SANTA CLARA	CA	95054	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	1,666
NOTRE DAME HIGH SCHOOL	596 SO 2ND ST	SAN JOSE	CA	95134	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
O'CONNOR HOSPITAL FOUNDATION	2105 FOREST AVE	SAN JOSE	CA	95128	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
PATHWAYS HOSPICE FOUNDATION	585 NORTH MARY AVENUE	SUNNYVALE	CA	94085	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
PLANETREE HEALTH LIBRARY	15891 LOS GATOS-ALMADEN ROAD	LOS GATOS	CA	95032	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	4,000
PRESENTATION HIGH SCHOOL	2281 PLUMMER AVENUE	SAN JOSE	CA	95125	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
RAFT	1355 RIDDER PARK DR	SAN JOSE	CA	95131	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
RONALD McDONALD HOUSE	520 SAN HILL ROAD	PALO ALTO	CA	94304	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,500
SACRED HEART COMMUNITY SERVICES	1381 SOUTH FIRST STREET	SAN JOSE	CA	95110	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	20,000
SACRED HEART NATIVITY SCHOOL	310 EDWARDS AVE	SAN JOSE	CA	95110	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	6,667
SAINTE CLAIRE HISTORIC PRESERVATION FDN	P O BOX 1327	SAN JOSE	CA	95109	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000

<u>RECIPIENT NAME</u>	<u>ADDRESS</u>	<u>CITY</u>	<u>STATE</u>	<u>ZIP</u>	<u>RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR</u>	<u>FOUNDATION STATUS OF RECIPIENT</u>	<u>PURPOSE OF GRANT OR CONTRIBUTION</u>	<u>AMOUNT</u>
SALVATION ARMY	359 NORTH 4TH STREET	SAN JOSE	CA	95112	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
SAN JOSE AUXILIARY TO LSPCH	400 HAMILTON AVE, STE 340	PALO ALTO	CA	94301	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	7,500
SAN JOSE REP	101 PASEO DE SAN ANTONIO	SAN JOSE	CA	95113	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
SAN JOSE ROTARY FOUNDATION	1690 SENTER ROAD	SAN JOSE	CA	95112	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,500
SAN JOSE STATE UNIVERSITY	ONE WASHINGTON SQUARE	SAN JOSE	CA	95192	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
SAN JOSE STATE UNIVERSITY LIBRARY	ONE WASHINGTON SQUARE	SAN JOSE	CA	95192	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
SANTA CLARA COUNCIL	1500 WARBURTON AVENUE	SANTA CLARA	CA	95050	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
SANTA CLARA COUNTY BOY SCOUTS OF AMERICA	970 W JULIAN	SAN JOSE	CA	95126	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
SECOND HARVEST FOOD BANK	750 CURTNER AVE	SAN JOSE	CA	95125	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
SERVICES FOR SENIORS, INC	P O BOX 418	SANTA CLARA	CA	95070	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,500
SILICON VALLEY FACES	777 N FIRST STREET, STE 220	SAN JOSE	CA	95112	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,500
SJ AUXILIARY TO LUCILE PACKARD	1362 LINCOLN AVE	SAN JOSE	CA	95125	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
SISU COLLEGE OF BUSINESS	ONE WASHINGTON SQUARE	SAN JOSE	CA	95192	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
SISU TOWER FOUNDATION	ONE WASHINGTON SQUARE	SAN JOSE	CA	95192	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
THE HEALTH TRUST	2105 S BASCOM AVE, SUITE 220	CAMPBELL	CA	95008	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
THE LEUKEMIA & LYMPHOMA SOCIETY	675 N FIRST ST, SUITE 1100	SAN JOSE	CA	95112	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	10,000
UNITED VETERANS COUNCIL	12 SO FIRST STREET, #219	SAN JOSE	CA	95113	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	7,500
VIA SERVICES	2851 PARK AVENUE	SANTA CLARA	CA	95050	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	7,500
VILLA SIENA FOUNDATION	1855 MIRAMONTE AVENUE	MOUNTAIN VIEW	CA	94040	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	7,500

<u>RECIPIENT NAME</u>	<u>ADDRESS</u>	<u>CITY</u>	<u>STATE</u>	<u>ZIP</u>	<u>RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR</u>	<u>FOUNDATION STATUS OF RECIPIENT</u>	<u>PURPOSE OF GRANT OR CONTRIBUTION</u>	<u>AMOUNT</u>
VMC FOUNDATION	2400 MOORPARK AVE STE 207	SAN JOSE	CA	95128	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
WELLNESS COMMUNITY	1055 MINNESOTA AVE STE 7	SAN JOSE	CA	95125	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
YMCA OF SILICON VALLEY	1922 THE ALAMEDA, 3RD FLOOR	SAN JOSE	CA	95126	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
YOUNG AT HEART PROJECT	18488 PROSPECT ROAD, STE 11	SARATOGA	CA	95070	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	2,500
YOUNG LIFE CAPERNAUM PROJECT	1123 HANCHETT AVE	SAN JOSE	CA	95126	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
YOUTH SCIENCE INSTITUTE	296 GARDEN HILL DRIVE	LOS GATOS	CA	95032	NONE	PUBLIC	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000
<b>TOTAL CONTRIBUTIONS PAID</b>								<b>425,000</b>

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

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

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box
  - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868

## Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only

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

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

<b>Type or print</b>	Name of Exempt Organization	STELLA B. GROSS CHARITABLE TRUST	Employer identification number
		C/O BANK OF THE WEST TRUST DEPARTMENT	23-7142181
	Number, street, and room or suite no If a P O box, see instructions	P. O. BOX 1121	
File by the due date for filing your return See instructions	City, town or post office, state, and ZIP code For a foreign address, see instructions	SAN JOSE, CA 95108	

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

- |   |  |                                    |
|---|--|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)     | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                             | <input type="checkbox"/> Form 8870 |

• The books are in the care of ► BANK OF THE WEST

Telephone No. ► 408 299-1657 FAX No. ► \_\_\_\_\_

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 02/15, 2011, to file the exempt organization return for the organization named above The extension is for the organization's return for:

- calendar year \_\_\_\_\_ or
- tax year beginning 07/01, 2009, and ending 06/30, 2010

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

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	<b>3a</b>	\$	1,449.
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	<b>3b</b>	\$	4,000.
<b>c Balance Due.</b> Subtract line 3b from line 3a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	<b>3c</b>	\$	

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

**For Privacy Act and Paperwork Reduction Act Notice, see Instructions.**