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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

For calendar year 2009, or tax year beginning OCT 1, 2009, and ending SEP 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<br><b>PATTY AND JACK WRIGHT FOUNDATION</b>                                                                          |                                                                                                                                                 | A Employer identification number<br><b>26-1207910</b>                                                                                                                        |
|                                                                                                                                                                                                                                                  | Number and street (or P.O. box number if mail is not delivered to street address) Room/suite<br><b>80 E. SIR FRANCIS DRAKE BLVD 2G</b> |                                                                                                                                                 | B Telephone number<br><b>415-464-8855</b>                                                                                                                                    |
|                                                                                                                                                                                                                                                  | City or town, state, and ZIP code<br><b>LARKSPUR, CA 94939</b>                                                                         |                                                                                                                                                 | C If exemption application is pending, check here <input type="checkbox"/>                                                                                                   |
|                                                                                                                                                                                                                                                  |                                                                                                                                        |                                                                                                                                                 | D 1. Foreign organizations, check here <input type="checkbox"/><br>2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation |                                                                                                                                        |                                                                                                                                                 | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>                                                                |
| I Fair market value of all assets at end of year (from Part II, col (c), line 16)<br>\$ <b>1,272,454.</b>                                                                                                                                        |                                                                                                                                        | J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____ | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>                                                             |

| Part I Analysis of Revenue and Expenses<br>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).) |                                                                                   | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| 1                                                                                                                                                   | Contributions, gifts, grants, etc., received                                      | 40,000.                            |                           | N/A                     |                                                             |
| 2                                                                                                                                                   | Check <input type="checkbox"/> if the foundation is not required to attach Sch. B |                                    |                           |                         |                                                             |
| 3                                                                                                                                                   | Interest on savings and temporary cash investments                                | 21.                                | 21.                       |                         | STATEMENT 1                                                 |
| 4                                                                                                                                                   | Dividends and interest from securities                                            | 30,920.                            | 30,920.                   |                         | STATEMENT 2                                                 |
| 5a                                                                                                                                                  | Gross rents                                                                       |                                    |                           |                         |                                                             |
| b                                                                                                                                                   | Net rental income or (loss)                                                       |                                    |                           |                         |                                                             |
| 6a                                                                                                                                                  | Net gain or (loss) from sale of assets not on line 10                             | 30,367.                            |                           |                         |                                                             |
| b                                                                                                                                                   | Gross sales price for all assets on line 6a <b>536,125.</b>                       |                                    |                           |                         |                                                             |
| 7                                                                                                                                                   | Capital gain net income (from Part IV, line 2)                                    |                                    | 30,367.                   |                         |                                                             |
| 8                                                                                                                                                   | Net short-term capital gain                                                       |                                    |                           |                         |                                                             |
| 9                                                                                                                                                   | Income modifications                                                              |                                    |                           |                         |                                                             |
| 10a                                                                                                                                                 | Gross sales less returns and allowances                                           |                                    |                           |                         |                                                             |
| b                                                                                                                                                   | Less: Cost of goods sold                                                          |                                    |                           |                         |                                                             |
| c                                                                                                                                                   | Gross profit or (loss)                                                            |                                    |                           |                         |                                                             |
| 11                                                                                                                                                  | Other income                                                                      |                                    |                           |                         |                                                             |
| 12                                                                                                                                                  | Total. Add lines 1 through 11                                                     | 101,308.                           | 61,308.                   |                         |                                                             |
| 13                                                                                                                                                  | Compensation of officers, directors, trustees, etc.                               | 0.                                 | 0.                        |                         | 0.                                                          |
| 14                                                                                                                                                  | Other employee salaries and wages                                                 |                                    |                           |                         |                                                             |
| 15                                                                                                                                                  | Pension plans, employee benefits                                                  |                                    |                           |                         |                                                             |
| 16a                                                                                                                                                 | Legal fees                                                                        |                                    |                           |                         |                                                             |
| b                                                                                                                                                   | Accounting fees STMT 3                                                            | 5,160.                             | 2,580.                    |                         | 2,580.                                                      |
| c                                                                                                                                                   | Other professional fees STMT 4                                                    | 4,207.                             | 4,207.                    |                         | 0.                                                          |
| 17                                                                                                                                                  | Interest                                                                          |                                    |                           |                         |                                                             |
| 18                                                                                                                                                  | Taxes STMT 5                                                                      | 613.                               | 613.                      |                         | 0.                                                          |
| 19                                                                                                                                                  | Depreciation and depletion                                                        |                                    |                           |                         |                                                             |
| 20                                                                                                                                                  | Occupancy                                                                         |                                    |                           |                         |                                                             |
| 21                                                                                                                                                  | Travel, conferences, and meetings                                                 |                                    |                           |                         |                                                             |
| 22                                                                                                                                                  | Printing and publications                                                         |                                    |                           |                         |                                                             |
| 23                                                                                                                                                  | Other expenses                                                                    |                                    |                           |                         |                                                             |
| 24                                                                                                                                                  | Total operating and administrative expenses. Add lines 13 through 23              | 9,980.                             | 7,400.                    |                         | 2,580.                                                      |
| 25                                                                                                                                                  | Contributions, gifts, grants paid                                                 | 56,000.                            |                           |                         | 56,000.                                                     |
| 26                                                                                                                                                  | Total expenses and disbursements. Add lines 24 and 25                             | 65,980.                            | 7,400.                    |                         | 58,580.                                                     |
| 27                                                                                                                                                  | Subtract line 26 from line 12                                                     | 35,328.                            |                           |                         |                                                             |
| a                                                                                                                                                   | Excess of revenue over expenses and disbursements                                 |                                    | 53,908.                   |                         |                                                             |
| b                                                                                                                                                   | Net investment income (if negative, enter -0-)                                    |                                    |                           |                         |                                                             |
| c                                                                                                                                                   | Adjusted net income (if negative, enter -0-)                                      |                                    |                           | N/A                     |                                                             |

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| <b>Part II Balance Sheets</b> <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small> |                                                                                                                                | 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                                                                                       | 25,117.           | 47,575.        | 47,575.               |
|                                                                                                                                              | 3 Accounts receivable ▶<br>Less allowance for doubtful accounts ▶                                                              |                   |                |                       |
|                                                                                                                                              | 4 Pledges receivable ▶<br>Less allowance for doubtful accounts ▶                                                               |                   |                |                       |
|                                                                                                                                              | 5 Grants receivable                                                                                                            |                   |                |                       |
|                                                                                                                                              | 6 Receivables due from officers, directors, trustees, and other disqualified persons                                           |                   |                |                       |
|                                                                                                                                              | 7 Other notes and loans receivable ▶<br>Less allowance for doubtful accounts ▶                                                 |                   |                |                       |
|                                                                                                                                              | 8 Inventories for sale or use                                                                                                  |                   |                |                       |
|                                                                                                                                              | 9 Prepaid expenses and deferred charges                                                                                        |                   |                |                       |
|                                                                                                                                              | 10a Investments - U S and state government obligations                                                                         |                   |                |                       |
|                                                                                                                                              | b Investments - corporate stock                                                                                                |                   |                |                       |
|                                                                                                                                              | c Investments - corporate bonds                                                                                                |                   |                |                       |
|                                                                                                                                              | 11 Investments - land, buildings, and equipment basis ▶<br>Less accumulated depreciation ▶                                     |                   |                |                       |
|                                                                                                                                              | 12 Investments - mortgage loans                                                                                                |                   |                |                       |
|                                                                                                                                              | 13 Investments - other <span style="float: right;">STMT 7</span>                                                               | 1,290,762.        | 1,303,632.     | 1,224,879.            |
| <b>Liabilities</b>                                                                                                                           | 14 Land, buildings, and equipment basis ▶<br>Less accumulated depreciation ▶                                                   |                   |                |                       |
|                                                                                                                                              | 15 Other assets (describe ▶ )                                                                                                  |                   |                |                       |
|                                                                                                                                              | 16 Total assets (to be completed by all filers)                                                                                | 1,315,879.        | 1,351,207.     | 1,272,454.            |
|                                                                                                                                              | 17 Accounts payable and accrued expenses                                                                                       |                   |                |                       |
|                                                                                                                                              | 18 Grants payable                                                                                                              |                   |                |                       |
| <b>Net Assets or Fund Balances</b>                                                                                                           | 19 Deferred revenue                                                                                                            |                   |                |                       |
|                                                                                                                                              | 20 Loans from officers, directors, trustees, and other disqualified persons                                                    |                   |                |                       |
|                                                                                                                                              | 21 Mortgages and other notes payable                                                                                           |                   |                |                       |
|                                                                                                                                              | 22 Other liabilities (describe ▶ )                                                                                             |                   |                |                       |
|                                                                                                                                              | 23 Total liabilities (add lines 17 through 22)                                                                                 | 0.                | 0.             |                       |
| <b>Net Assets or Fund Balances</b>                                                                                                           | Foundations that follow SFAS 117, check here <input type="checkbox"/><br>and complete lines 24 through 26 and lines 30 and 31. |                   |                |                       |
|                                                                                                                                              | 24 Unrestricted                                                                                                                |                   |                |                       |
|                                                                                                                                              | 25 Temporarily restricted                                                                                                      |                   |                |                       |
|                                                                                                                                              | 26 Permanently restricted                                                                                                      |                   |                |                       |
|                                                                                                                                              | Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/><br>and complete lines 27 through 31.   |                   |                |                       |
|                                                                                                                                              | 27 Capital stock, trust principal, or current funds                                                                            | 0.                | 0.             |                       |
|                                                                                                                                              | 28 Paid-in or capital surplus, or land, bldg., and equipment fund                                                              | 0.                | 0.             |                       |
|                                                                                                                                              | 29 Retained earnings, accumulated income, endowment, or other funds                                                            | 1,315,879.        | 1,351,207.     |                       |
| <b>Net Assets or Fund Balances</b>                                                                                                           | 30 Total net assets or fund balances                                                                                           | 1,315,879.        | 1,351,207.     |                       |
|                                                                                                                                              | 31 Total liabilities and net assets/fund balances                                                                              | 1,315,879.        | 1,351,207.     |                       |

**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<br>(must agree with end-of-year figure reported on prior year's return) | 1 | 1,315,879. |
| 2 Enter amount from Part I, line 27a                                                                                                                            | 2 | 35,328.    |
| 3 Other increases not included in line 2 (itemize) ▶                                                                                                            | 3 | 0.         |
| 4 Add lines 1, 2, and 3                                                                                                                                         | 4 | 1,351,207. |
| 5 Decreases not included in line 2 (itemize) ▶                                                                                                                  | 5 | 0.         |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30                                                         | 6 | 1,351,207. |

**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>1a</b> SANFORD BERNSTEIN                                                                                                       | P                                                | VARIOUS                              | VARIOUS                          |
| <b>b</b> SANFORD BERNSTEIN                                                                                                        | P                                                | VARIOUS                              | VARIOUS                          |
| <b>c</b> SANFORD BERNSTEIN - CASH IN LIEU                                                                                         | P                                                | VARIOUS                              | VARIOUS                          |
| <b>d</b> 478.203 SHARES OF NEW WORLD FUND A                                                                                       | P                                                | VARIOUS                              | 06/30/10                         |
| <b>e</b> 695.568 SHARES OF SMALLCAP WORLD FUND A                                                                                  | P                                                | VARIOUS                              | 06/30/10                         |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| <b>a</b> 371,021.     |                                            | 335,506.                                        | 35,515.                                      |
| <b>b</b> 122,060.     |                                            | 127,180.                                        | -5,120.                                      |
| <b>c</b> 44.          |                                            |                                                 | 44.                                          |
| <b>d</b> 21,500.      |                                            | 21,943.                                         | -443.                                        |
| <b>e</b> 21,500.      |                                            | 21,129.                                         | 371.                                         |

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

| (i) FMV as of 12/31/69 | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col (i)<br>over col (j), if any | (l) Gains (Col (h) gain minus<br>col (k), but not less than -0-) or<br>Losses (from col (h)) |
|------------------------|--------------------------------------|-----------------------------------------------|----------------------------------------------------------------------------------------------|
| <b>a</b>               |                                      |                                               | 35,515.                                                                                      |
| <b>b</b>               |                                      |                                               | -5,120.                                                                                      |
| <b>c</b>               |                                      |                                               | 44.                                                                                          |
| <b>d</b>               |                                      |                                               | -443.                                                                                        |
| <b>e</b>               |                                      |                                               | 371.                                                                                         |

|                                                                                                                                                                                      |                                                                                     |          |         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|----------|---------|
| <b>2</b> Capital gain net income or (net capital loss)                                                                                                                               | { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 } | <b>2</b> | 30,367. |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br>If gain, also enter in Part I, line 8, column (c)<br>If (loss), enter -0- in Part I, line 8 |                                                                                     | <b>3</b> | N/A     |

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

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

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

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

☐ Yes ☒ No

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

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

| (a) Base period years<br>Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio<br>(col (b) divided by col (c)) |
|-------------------------------------------------------------------|---------------------------------------|-------------------------------------------|--------------------------------------------------------|
| 2008                                                              | 54,324.                               | 1,015,870.                                | .053475                                                |
| 2007                                                              | 8,246.                                | 1,265,421.                                | .006516                                                |
| 2006                                                              |                                       |                                           |                                                        |
| 2005                                                              |                                       |                                           |                                                        |
| 2004                                                              |                                       |                                           |                                                        |

|                                                                                                                                                                                       |          |            |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------------|
| <b>2</b> Total of line 1, column (d)                                                                                                                                                  | <b>2</b> | .059991    |
| <b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | <b>3</b> | .029996    |
| <b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5                                                                                                 | <b>4</b> | 1,219,939. |
| <b>5</b> Multiply line 4 by line 3                                                                                                                                                    | <b>5</b> | 36,593.    |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                   | <b>6</b> | 539.       |
| <b>7</b> Add lines 5 and 6                                                                                                                                                            | <b>7</b> | 37,132.    |
| <b>8</b> Enter qualifying distributions from Part XII, line 4                                                                                                                         | <b>8</b> | 58,580.    |

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.

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

|                                                                                                                                                                                                                                      |    |      |      |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|------|------|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1<br>Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions) |    | 1    | 539. |
| 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                                                                         |    |      |      |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)                                                                                                             |    |      |      |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                          |    | 2    | 0.   |
| 3 Add lines 1 and 2                                                                                                                                                                                                                  |    | 3    | 539. |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                        |    | 4    | 0.   |
| 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-                                                                                                                                            |    | 5    | 539. |
| 6 Credits/Payments                                                                                                                                                                                                                   |    |      |      |
| a 2009 estimated tax payments and 2008 overpayment credited to 2009                                                                                                                                                                  | 6a | 732. |      |
| 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  | 732. |      |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached                                                                                                                  | 8  |      |      |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed                                                                                                                                                      | 9  |      |      |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid                                                                                                                                         | 10 | 193. |      |
| 11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 193.   Refunded <input type="checkbox"/>                                                                                     | 11 | 0.   |      |

**Part VII-A Statements Regarding Activities**

|                                                                                                                                                                                                                                                                                                                                           | Yes | No |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?                                                                                                                                                                   |     | X  |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?<br>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. |     | X  |
| c Did the foundation file Form 1120-POL for this year?                                                                                                                                                                                                                                                                                    |     | X  |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(1) On the foundation <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.                                                                                              |     |    |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.                                                                                                                                                          |     |    |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br>If "Yes," attach a detailed description of the activities.                                                                                                                                                                           |     | X  |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes                                                                                                              |     | X  |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                                                                                                                            |     | X  |
| b If "Yes," has it filed a tax return on Form 990-T for this year?                                                                                                                                                                                                                                                                        |     |    |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br>If "Yes," attach the statement required by General Instruction T.                                                                                                                                                                     |     | X  |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<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?      |     | X  |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year?<br>If "Yes," complete Part II, col. (c), and Part XV.                                                                                                                                                                                                   | X   |    |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" 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? If "No," attach explanation                                                                                                                             | X   |    |
| 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV                                                                                    |     | X  |
| 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses                                                                                                                                                                                                     |     | X  |

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

|    |                                                                                                                                                                                                 |    |   |   |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---|---|
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)         | 11 |   | X |
| 12 | Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?                                                                           | 12 |   | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application?<br>Website address ▶ N/A                                                    | 13 | X |   |
| 14 | The books are in care of ▶ GEORGE R. DIRKES Telephone no ▶ 415-464-8855<br>Located at ▶ 80 E. SIR FRANCIS DRAKE BLVD, SU 2G, LARKSPUR, CA ZIP+4 ▶ 94939                                         |    |   |   |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here<br>and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A |    |   |   |

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

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

|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Yes | No |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1a  | During the year did the foundation (either directly or indirectly)                                                                                                                                                                                                                                                                                                                                                                                                                                 |     |    |
| (1) | Engage in the sale or exchange, or leasing of property with a disqualified person? <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   | If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A ▶ <input type="checkbox"/>                                                                                                                                              | 1b  |    |
| c   | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?                                                                                                                                                                                                                                                                                                            | 1c  | 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<br>If "Yes," list the years ▶                                                                                                                                                                                                                                                |     |    |
| b   | Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) N/A                                                                                                                                                                                       | 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 ▶                                                                                                                                                                                                                                                                                                                                                                                  |     |    |
| 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) N/A | 3b  |    |
| 4a  | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?                                                                                                                                                                                                                                                                                                                                                                                    | 4a  | X  |
| b   | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?                                                                                                                                                                                                                                                                  | 4b  | X  |

Form 990-PF (2009)

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

N/A

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

If "Yes" to 6b, file Form 8870.

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

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

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

| (a) Name and address | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|----------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| SEE STATEMENT 8      |                                                           | 0.                                        | 0.                                                                    | 0.                                    |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |

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

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

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

0

Form 990-PF (2009)





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

|   |                                                                                                            |    |            |
|---|------------------------------------------------------------------------------------------------------------|----|------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes |    |            |
| a | Average monthly fair market value of securities                                                            | 1a | 1,185,651. |
| b | Average of monthly cash balances                                                                           | 1b | 52,866.    |
| c | Fair market value of all other assets                                                                      | 1c |            |
| d | Total (add lines 1a, b, and c)                                                                             | 1d | 1,238,517. |
| e | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  | 1e | 0.         |
| 2 | Acquisition indebtedness applicable to line 1 assets                                                       | 2  | 0.         |
| 3 | Subtract line 2 from line 1d                                                                               | 3  | 1,238,517. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  | 4  | 18,578.    |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4       | 5  | 1,219,939. |
| 6 | Minimum investment return. Enter 5% of line 5                                                              | 6  | 60,997.    |

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

|    |                                                                                                    |    |         |
|----|----------------------------------------------------------------------------------------------------|----|---------|
| 1  | Minimum investment return from Part X, line 6                                                      | 1  | 60,997. |
| 2a | Tax on investment income for 2009 from Part VI, line 5                                             | 2a | 539.    |
| b  | Income tax for 2009 (This does not include the tax from Part VI)                                   | 2b |         |
| c  | Add lines 2a and 2b                                                                                | 2c | 539.    |
| 3  | Distributable amount before adjustments. Subtract line 2c from line 1                              | 3  | 60,458. |
| 4  | Recoveries of amounts treated as qualifying distributions                                          | 4  | 0.      |
| 5  | Add lines 3 and 4                                                                                  | 5  | 60,458. |
| 6  | Deduction from distributable amount (see instructions)                                             | 6  | 0.      |
| 7  | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7  | 60,458. |

**Part XII** Qualifying Distributions (see instructions)

|   |                                                                                                                                   |    |         |
|---|-----------------------------------------------------------------------------------------------------------------------------------|----|---------|
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes                                         |    |         |
| a | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26                                                     | 1a | 58,580. |
| b | Program-related investments - total from Part IX-B                                                                                | 1b | 0.      |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                         | 2  |         |
| 3 | Amounts set aside for specific charitable projects that satisfy the                                                               |    |         |
| a | Suitability test (prior IRS approval required)                                                                                    | 3a |         |
| b | Cash distribution test (attach the required schedule)                                                                             | 3b |         |
| 4 | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                        | 4  | 58,580. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b | 5  | 539.    |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4                                                                    | 6  | 58,041. |

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

Form 990-PF (2009)

**Part XIII** Undistributed Income (see instructions)

|                                                                                                                                                                                   | (a)<br>Corpus | (b)<br>Years prior to 2008 | (c)<br>2008 | (d)<br>2009 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2009 from Part XI, line 7                                                                                                                       |               |                            |             | 60,458.     |
| <b>2</b> Undistributed Income, if any, as of the end of 2009                                                                                                                      |               |                            |             |             |
| <b>a</b> Enter amount for 2008 only                                                                                                                                               |               |                            | 47,964.     |             |
| <b>b</b> Total for prior years                                                                                                                                                    |               | 0.                         |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2009                                                                                                                          |               |                            |             |             |
| <b>a</b> From 2004                                                                                                                                                                |               |                            |             |             |
| <b>b</b> From 2005                                                                                                                                                                |               |                            |             |             |
| <b>c</b> From 2006                                                                                                                                                                |               |                            |             |             |
| <b>d</b> From 2007                                                                                                                                                                |               |                            |             |             |
| <b>e</b> From 2008                                                                                                                                                                |               |                            |             |             |
| <b>f</b> Total of lines 3a through e                                                                                                                                              | 0.            |                            |             |             |
| <b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 58,580.                                                                                                     |               |                            |             |             |
| <b>a</b> Applied to 2008, but not more than line 2a                                                                                                                               |               |                            | 47,964.     |             |
| <b>b</b> Applied to undistributed income of prior years (Election required - see instructions)                                                                                    |               | 0.                         |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required - see instructions)                                                                                            | 0.            |                            |             |             |
| <b>d</b> Applied to 2009 distributable amount                                                                                                                                     |               |                            |             | 10,616.     |
| <b>e</b> Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))                                         | 0.            |                            |             | 0.          |
| <b>6</b> Enter the net total of each column as indicated below:                                                                                                                   |               |                            |             |             |
| <b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5                                                                                                                          | 0.            |                            |             |             |
| <b>b</b> Prior years' undistributed income Subtract line 4b from line 2b                                                                                                          |               | 0.                         |             |             |
| <b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed |               | 0.                         |             |             |
| <b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions                                                                                                          |               | 0.                         |             |             |
| <b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr                                                                                   |               |                            | 0.          |             |
| <b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010                                                                |               |                            |             | 49,842.     |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)                                                     | 0.            |                            |             |             |
| <b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7                                                                                                 | 0.            |                            |             |             |
| <b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a                                                                                              | 0.            |                            |             |             |
| <b>10</b> Analysis of line 9                                                                                                                                                      |               |                            |             |             |
| <b>a</b> Excess from 2005                                                                                                                                                         |               |                            |             |             |
| <b>b</b> Excess from 2006                                                                                                                                                         |               |                            |             |             |
| <b>c</b> Excess from 2007                                                                                                                                                         |               |                            |             |             |
| <b>d</b> Excess from 2008                                                                                                                                                         |               |                            |             |             |
| <b>e</b> Excess from 2009                                                                                                                                                         |               |                            |             |             |

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

---

N/A

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

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

**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</b> Paid during the year<br>CHARITABLE DISBURSEMENTS<br>- SEE ATTACHED DETAILS |                                                                                                           |                                |                                  | 56,000. |
| <b>Total</b>                                                                        |                                                                                                           |                                | <b>3a</b>                        | 56,000. |
| <b>b</b> Approved for future payment<br><br>NONE                                    |                                                                                                           |                                |                                  |         |
| <b>Total</b>                                                                        |                                                                                                           |                                | <b>3b</b>                        | 0.      |



## Part XVII

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

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




[illegible]

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

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

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

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

|                          |                                                                                                                                                            |                     |                                                 |                                                                                                                    |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Sign Here                | <br>Signature of officer or trustee                                     |                     | Feb 3 2011<br>Date                              | Director<br>Title                                                                                                  |
|                          | Preparer's signature<br><br>Kathleen Burr<br>FEB 02 2011                | Date<br>FEB 02 2011 | Check if self-employed <input type="checkbox"/> | Preparer's identifying number                                                                                      |
| Paid Preparer's Use Only | Firm's name (or yours if self-employed), address, and ZIP code<br>CALEGARI & MORRIS, ACCOUNTANTS<br>123 MISSION STREET, 18TH FL<br>SAN FRANCISCO, CA 94105 |                     |                                                 | EIN <br>Phone no (415) 981-8766 |

**Schedule B.**  
**(Form 990, 990-EZ,**  
**or 990-PF)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

► **Attach to Form 990, 990-EZ, or 990-PF.**

OMB No 1545-0047

**2009**

**Name of the organization**

PATTY AND JACK WRIGHT FOUNDATION

**Employer identification number**

26-1207910

**Organization type** (check one):

**Filers of:**

**Section:**

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ► \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA **For Privacy Act and Paperwork Reduction Act Notice, see the Instructions**  
for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

PATTY AND JACK WRIGHT FOUNDATION

26-1207910

**Part I Contributors** (see instructions)

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4    | (c)<br>Aggregate contributions | (d)<br>Type of contribution                                                                                                                                                         |
|------------|--------------------------------------|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1          | JOHN A. WRIGHT<br>SAME AS FOUNDATION | \$ 40,000.                     | Person <input checked="checked" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
|            |                                      | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |
|            |                                      | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |
|            |                                      | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |
|            |                                      | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |
|            |                                      | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |
|            |                                      | \$                             | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |



|                                  |                                |
|----------------------------------|--------------------------------|
| Name of organization             | Employer identification number |
| PATTY AND JACK WRIGHT FOUNDATION | 26-1207910                     |

**Part II Noncash Property** (see instructions)

| (a)<br>No.<br>from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|------------------------------|----------------------------------------------|------------------------------------------------|----------------------|
|                              |                                              | \$                                             |                      |
|                              |                                              | \$                                             |                      |
|                              |                                              | \$                                             |                      |
|                              |                                              | \$                                             |                      |
|                              |                                              | \$                                             |                      |
|                              |                                              | \$                                             |                      |
|                              |                                              | \$                                             |                      |
|                              |                                              | \$                                             |                      |
|                              |                                              | \$                                             |                      |

Name of organization

Employer identification number

PATTY AND JACK WRIGHT FOUNDATION

26-1207910

**Part III** Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$

| (a) No.<br>from<br>Part I | (b) Purpose of gift                     | (c) Use of gift | (d) Description of how gift is held      |
|---------------------------|-----------------------------------------|-----------------|------------------------------------------|
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

| SOURCE                                         | AMOUNT |
|------------------------------------------------|--------|
| BANK OF MARIN                                  | 18.    |
| SANFORD BERNSTEIN                              | 3.     |
| TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A | 21.    |

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

| SOURCE                           | GROSS AMOUNT | CAPITAL GAINS<br>DIVIDENDS | COLUMN (A)<br>AMOUNT |
|----------------------------------|--------------|----------------------------|----------------------|
| AMERICAN FUNDS                   | 11,980.      | 0.                         | 11,980.              |
| SANFORD BERNSTEIN                | 18,940.      | 0.                         | 18,940.              |
| TOTAL TO FM 990-PF, PART I, LN 4 | 30,920.      | 0.                         | 30,920.              |

FORM 990-PF ACCOUNTING FEES STATEMENT 3

| DESCRIPTION                  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| ACCOUNTING FEES              | 5,160.                       | 2,580.                            |                               | 2,580.                        |
| TO FORM 990-PF, PG 1, LN 16B | 5,160.                       | 2,580.                            |                               | 2,580.                        |

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

| DESCRIPTION                  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| MANAGEMENT FEES              | 4,207.                       | 4,207.                            |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 16C | 4,207.                       | 4,207.                            |                               | 0.                            |

| FORM 990-PF                 | TAXES                        |                                   |                               | STATEMENT                     | 5 |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|---|
| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |   |
| FOREIGN TAXES PAID          | 613.                         | 613.                              |                               | 0.                            |   |
| TO FORM 990-PF, PG 1, LN 18 | 613.                         | 613.                              |                               | 0.                            |   |

## FOOTNOTES

STATEMENT 6

NO GOODS AND SERVICES WERE RECEIVED IN EXCHANGE FOR THE CASH  
CONTRIBUTION OF \$40,000

| FORM 990-PF                              | OTHER INVESTMENTS | STATEMENT  | 7                 |
|------------------------------------------|-------------------|------------|-------------------|
| DESCRIPTION                              | VALUATION METHOD  | BOOK VALUE | FAIR MARKET VALUE |
| SANFORD BERNSTEIN - SEE ATTACHED DETAILS | COST              | 821,710.   | 726,983.          |
| AMERICAN FUNDS - EUROPACIFIC GROWTH      | COST              | 107,027.   | 107,938.          |
| AMERICAN FUNDS - NEW WORLD FUND          | COST              | 80,406.    | 92,453.           |
| AMERICAN FUNDS - SMALLCAP WORLD FUND     | COST              | 79,516.    | 93,764.           |
| AMERICAN FUNDS - CAPITAL INCOME BUILDER  | COST              | 214,973.   | 203,741.          |
| TOTAL TO FORM 990-PF, PART II, LINE 13   |                   | 1,303,632. | 1,224,879.        |

| FORM 990-PF                                  | PART VIII - LIST OF OFFICERS, DIRECTORS<br>TRUSTEES AND FOUNDATION MANAGERS | STATEMENT         | 8                            |                    |
|----------------------------------------------|-----------------------------------------------------------------------------|-------------------|------------------------------|--------------------|
| NAME AND ADDRESS                             | TITLE AND<br>AVRG HRS/WK                                                    | COMPEN-<br>SATION | EMPLOYEE<br>BEN PLAN CONTRIB | EXPENSE<br>ACCOUNT |
| CHARLES WRIGHT<br>SAME AS FOUNDATION         | TRUSTEE<br>0.00                                                             | 0.                | 0.                           | 0.                 |
| HELENE K WRIGHT<br>SAME AS FOUNDATION        | TRUSTEE<br>0.00                                                             | 0.                | 0.                           | 0.                 |
| EDWIN WRIGHT<br>SAME AS FOUNDATION           | TRUSTEE<br>0.00                                                             | 0.                | 0.                           | 0.                 |
| APRIL WRIGHT<br>SAME AS FOUNDATION           | TRUSTEE<br>0.00                                                             | 0.                | 0.                           | 0.                 |
| J. ANTHONY WRIGHT<br>SAME AS FOUNDATION      | TRUSTEE<br>0.00                                                             | 0.                | 0.                           | 0.                 |
| TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII |                                                                             | 0.                | 0.                           | 0.                 |

FORM 990-PF

PART XV - LINE 1A  
LIST OF FOUNDATION MANAGERS

STATEMENT 9

NAME OF MANAGER

CHARLES WRIGHT  
HELENE K WRIGHT  
EDWIN WRIGHT  
APRIL WRIGHT  
J. ANTHONY WRIGHT

**Patty and Jack Wright Foundation**  
**FYE September 30, 2010**  
**FEIN 26-1207910**

| Qty.       | Holding                                              | Total Cost | Market Value |
|------------|------------------------------------------------------|------------|--------------|
| 10,366 280 | BERNSTEIN INTER DURATION                             | \$ 136,496 | \$ 146,476   |
| 9,906 267  | ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I | \$ 108,200 | \$ 86,185    |
| 8,416 578  | BERNSTEIN INTL VALUE II PORT                         | \$ 192,952 | \$ 126,922   |
| 1,110 112  | BERNSTEIN EMERG MARKETS VALUE                        | \$ 42,058  | \$ 34,858    |
| 415 000    | JPMORGAN CHASE & CO                                  | \$ 16,986  | \$ 15,795    |
| 44 000     | APPLE INC                                            | \$ 9,534   | \$ 12,485    |
| 54 000     | ALCON INC                                            | \$ 8,731   | \$ 9,007     |
| 17 000     | GOOGLE INC-CL A                                      | \$ 11,195  | \$ 8,938     |
| 130 000    | JOHNSON & JOHNSON                                    | \$ 7,772   | \$ 8,055     |
| 315 000    | WELLS FARGO & COMPANY                                | \$ 9,001   | \$ 7,911     |
| 425 000    | PFIZER INC                                           | \$ 8,835   | \$ 7,297     |
| 115 000    | SCHLUMBERGER LTD                                     | \$ 9,248   | \$ 7,085     |
| 47 000     | GOLDMAN SACHS GROUP INC                              | \$ 7,037   | \$ 6,795     |
| 185 000    | GILEAD SCIENCES INC                                  | \$ 8,541   | \$ 6,588     |
| 115 000    | KOHL'S CORP                                          | \$ 6,174   | \$ 6,058     |
| 105 000    | TIME WARNER CABLE                                    | \$ 4,560   | \$ 5,669     |
| 445 000    | FORD MOTOR CO                                        | \$ 5,381   | \$ 5,447     |
| 129 000    | HEWLETT-PACKARD CO                                   | \$ 6,426   | \$ 5,427     |
| 63 000     | FREEPORT-MCMORAN COPPER                              | \$ 4,534   | \$ 5,380     |
| 290 000    | COMCAST CORP-CL A                                    | \$ 5,319   | \$ 5,243     |
| 250 000    | EMC CORP/MASS                                        | \$ 4,433   | \$ 5,078     |
| 365 000    | NEWS CORP                                            | \$ 5,025   | \$ 4,767     |
| 155 000    | AT&T INC                                             | \$ 6,024   | \$ 4,433     |
| 190 000    | CISCO SYSTEMS INC                                    | \$ 4,950   | \$ 4,161     |
| 100 000    | DANAHER CORP                                         | \$ 3,837   | \$ 4,061     |
| 300 000    | BANK OF AMERICA CORP                                 | \$ 4,760   | \$ 3,931     |
| 70 000     | TEVA PHARMACEUTICAL-SP ADR                           | \$ 3,979   | \$ 3,693     |
| 64 000     | CONOCOPHILLIPS                                       | \$ 3,304   | \$ 3,676     |
| 130 000    | DOW CHEMICAL                                         | \$ 3,376   | \$ 3,570     |
| 55 000     | DEVON ENERGY CORPORATION                             | \$ 3,708   | \$ 3,561     |
| 70 000     | ASTRAZENECA PLC-SPONS ADR                            | \$ 2,920   | \$ 3,549     |
| 53 000     | PEPSICO INC                                          | \$ 3,551   | \$ 3,521     |
| 45 000     | NOBLE ENERGY INC                                     | \$ 3,287   | \$ 3,379     |
| 100 000    | MARATHON OIL CORP                                    | \$ 3,274   | \$ 3,310     |
| 135 000    | MICROSOFT CORP                                       | \$ 3,550   | \$ 3,306     |
| 70 000     | ILLINOIS TOOL WORKS                                  | \$ 3,437   | \$ 3,291     |
| 55 000     | BUNGE LTD                                            | \$ 3,197   | \$ 3,254     |
| 55 000     | HESS CORP                                            | \$ 2,970   | \$ 3,252     |
| 90 000     | INGERSOLL-RAND PLC                                   | \$ 3,217   | \$ 3,214     |
| 65 000     | COOPER INDUSTRIES PLC                                | \$ 2,816   | \$ 3,180     |
| 100 000    | JOHNSON CONTROLS INC                                 | \$ 2,763   | \$ 3,050     |
| 50 000     | PROCTER & GAMBLE CO                                  | \$ 3,030   | \$ 2,999     |
| 225 000    | DELL INC                                             | \$ 3,031   | \$ 2,916     |
| 65 000     | ENSCO PLC- SPON ADR                                  | \$ 2,838   | \$ 2,907     |
| 85 000     | THE WALT DISNEY CO                                   | \$ 2,874   | \$ 2,814     |
| 43 000     | COSTCO WHOLESALE CORP                                | \$ 2,587   | \$ 2,773     |
| 125 000    | SAFEWAY INC                                          | \$ 3,197   | \$ 2,645     |
| 50 000     | DOVER CORP                                           | \$ 2,342   | \$ 2,611     |
| 140 000    | GAP INC/THE                                          | \$ 3,014   | \$ 2,610     |

**Patty and Jack Wright Foundation**  
**FYE September 30, 2010**  
**FEIN 26-1207910**

| Qty.    | Holding                     | Total Cost | Market Value |
|---------|-----------------------------|------------|--------------|
| 50 000  | TRAVELERS COS INC/THE       | \$ 2,645   | \$ 2,605     |
| 45 000  | CELGENE CORP                | \$ 2,589   | \$ 2,592     |
| 85 000  | TYCO ELECTRONICS LTD        | \$ 2,108   | \$ 2,484     |
| 70 000  | BROADCOM CORP-CL A          | \$ 2,301   | \$ 2,477     |
| 110 000 | LOWE'S COS INC              | \$ 2,822   | \$ 2,452     |
| 45 000  | TARGET CORP                 | \$ 2,280   | \$ 2,405     |
| 9 000   | CME GROUP INC               | \$ 3,374   | \$ 2,344     |
| 35 000  | UNITED PARCEL SERVICE-CL B  | \$ 2,299   | \$ 2,334     |
| 115 000 | NEXEN INC                   | \$ 2,661   | \$ 2,312     |
| 75 000  | GARMIN LTD                  | \$ 2,432   | \$ 2,276     |
| 140 000 | GENERAL ELECTRIC CO         | \$ 2,178   | \$ 2,275     |
| 450 000 | SPRINT NEXTEL CORP          | \$ 1,712   | \$ 2,084     |
| 115 000 | CONSTELLATION BRANDS INC-A  | \$ 1,873   | \$ 2,034     |
| 35 000  | NEWFIELD EXPLORATION CO     | \$ 1,839   | \$ 2,010     |
| 25 000  | LEAR CORP                   | \$ 1,705   | \$ 1,973     |
| 115 000 | SMITHFIELD FOODS INC        | \$ 1,829   | \$ 1,935     |
| 35 000  | ROSS STORES INC             | \$ 1,766   | \$ 1,912     |
| 55 000  | VERTEX PHARMACEUTICALS INC  | \$ 2,149   | \$ 1,901     |
| 100 000 | PEPCO HOLDINGS INC          | \$ 1,688   | \$ 1,860     |
| 20 000  | EOG RESOURCES INC           | \$ 2,000   | \$ 1,859     |
| 75 000  | MORGAN STANLEY              | \$ 2,302   | \$ 1,851     |
| 25 000  | GOODRICH CORP               | \$ 1,781   | \$ 1,843     |
| 60 000  | TIME WARNER INC             | \$ 1,804   | \$ 1,839     |
| 70 000  | CABLEVISION SYS CORP        | \$ 1,749   | \$ 1,833     |
| 45 000  | CAPITAL ONE FINANCIAL CORP  | \$ 1,845   | \$ 1,780     |
| 25 000  | PARKER HANNIFIN CORP        | \$ 1,601   | \$ 1,752     |
| 130 000 | SARA LEE CORP               | \$ 1,886   | \$ 1,746     |
| 18 000  | CF INDUSTRIES HOLDINGS INC  | \$ 1,625   | \$ 1,719     |
| 35 000  | EXPRESS SCRIPTS INC         | \$ 1,760   | \$ 1,705     |
| 28 000  | NORTHROP GRUMMAN CORP       | \$ 1,588   | \$ 1,698     |
| 25 000  | KIMBERLY-CLARK CORP         | \$ 1,599   | \$ 1,626     |
| 65 000  | VODAFONE GROUP PLC-SP ADR   | \$ 1,462   | \$ 1,613     |
| 45 000  | KLA-TENCOR CORPORATION      | \$ 1,636   | \$ 1,585     |
| 40 000  | CENTURYLINK INC             | \$ 1,585   | \$ 1,578     |
| 135 000 | DELTA AIR LINES INC         | \$ 1,822   | \$ 1,571     |
| 125 000 | FIFTH THIRD BANCORP         | \$ 1,699   | \$ 1,504     |
| 19 000  | OCCIDENTAL PETROLEUM CORP   | \$ 1,555   | \$ 1,488     |
| 35 000  | DIRECTV-CLASS A             | \$ 1,326   | \$ 1,457     |
| 90 000  | CBS CORP-CLASS B NON VOTING | \$ 1,287   | \$ 1,427     |
| 35 000  | COVIDIEN PLC                | \$ 1,696   | \$ 1,407     |
| 70 000  | INTEL CORP                  | \$ 1,442   | \$ 1,346     |
| 50 000  | ORACLE CORP                 | \$ 1,356   | \$ 1,343     |
| 55 000  | BB&T CORP                   | \$ 1,467   | \$ 1,324     |
| 2 000   | NVR INC                     | \$ 1,424   | \$ 1,295     |
| 30 000  | CAMERON INTERNATIONAL CORP  | \$ 1,343   | \$ 1,289     |
| 275 000 | OFFICE DEPOT INC            | \$ 1,815   | \$ 1,265     |
| 40 000  | ROYAL CARIBBEAN CRUISES LTD | \$ 1,069   | \$ 1,261     |
| 8 000   | AMAZON COM INC              | \$ 983     | \$ 1,256     |
| 145 000 | MOTOROLA INC                | \$ 935     | \$ 1,237     |



**Patty and Jack Wright Foundation**  
**FYE September 30, 2010**  
**FEIN 26-1207910**

| Qty.                       | Holding                     | Total Cost        | Market Value      |
|----------------------------|-----------------------------|-------------------|-------------------|
| 25 000                     | MONSANTO CO                 | \$ 1,464          | \$ 1,198          |
| 25 000                     | RAYTHEON COMPANY            | \$ 1,239          | \$ 1,143          |
| 35 000                     | SUNCOR ENERGY INC           | \$ 1,286          | \$ 1,139          |
| 35 000                     | CONSTELLATION ENERGY GROUP  | \$ 1,219          | \$ 1,128          |
| 30 000                     | COMERICA INC                | \$ 1,208          | \$ 1,115          |
| 25 000                     | HONEYWELL INTERNATIONAL INC | \$ 1,034          | \$ 1,099          |
| 12 000                     | POLO RALPH LAUREN CORP      | \$ 922            | \$ 1,078          |
| 35 000                     | ROWAN COMPANIES INC         | \$ 923            | \$ 1,063          |
| 35 000                     | JUNIPER NETWORKS INC        | \$ 953            | \$ 1,062          |
| 60 000                     | NISOURCE INC                | \$ 943            | \$ 1,044          |
| 45 000                     | XL GROUP PLC                | \$ 828            | \$ 975            |
| 14 000                     | CITRIX SYSTEMS INC          | \$ 953            | \$ 955            |
| 65 000                     | COMMERCIAL METALS CO        | \$ 863            | \$ 942            |
| 12 000                     | DEERE & CO                  | \$ 869            | \$ 837            |
| 75 000                     | D R HORTON INC              | \$ 822            | \$ 834            |
| 45 000                     | CORNING INC                 | \$ 869            | \$ 823            |
| 15 000                     | TOTAL SA-SPON ADR           | \$ 1,282          | \$ 774            |
| 30 000                     | STARBUCKS CORP              | \$ 744            | \$ 767            |
| 10 000                     | AGRIUM INC                  | \$ 694            | \$ 750            |
| 80 000                     | PULTE GROUP INC             | \$ 960            | \$ 701            |
| 8 000                      | FEDEX CORP                  | \$ 668            | \$ 684            |
| 5 000                      | FRANKLIN RESOURCES INC      | \$ 568            | \$ 535            |
| 6 000                      | VISA INC - CLASS A SHRS     | \$ 437            | \$ 446            |
| <b>NET PORTFOLIO VALUE</b> |                             | <b>\$ 821,710</b> | <b>\$ 726,983</b> |

Unity Foundation / Agape Foundation  
1095 Market Street, San Francisco, CA

Relationship N/A  
Status 509(a)(1)  
Purpose Supporting non-profit arts video programming  
Amount \$4,000

Habitat for Humanity  
East Bay  
2619 Broadway, Oakland, CA 94612

Relationship N/A  
Status 509(a)(1)  
Purpose Building housing for poor in Oakland  
Amount \$5,000

LEAP Program  
Lagunitas School District, P.O. Box 308, San Geronimo, Ca 94963

Relationship N/A  
Status 509(a)(1)  
Purpose supporting extra-curricular school programs  
Amount \$1,000

Marin Agricultural Land Trust  
P O. Box 809, Pt Reyes Station, CA 94956

Relationship N/A  
Status 509(a)(1)  
Purpose Land conservation in Marin County  
Amount \$5,000

Meritus College Fund  
P O Box 29024, San Francisco, CA 94129-0024

Relationship N/A  
Status 509(a)(1)  
Purpose Supporting non-tuition expenses for SF HS graduates through College  
Amount \$3,000

Pachamama Alliance  
The Presidio Building Ground Floor  
P O Box 29191, San Francisco, CA 94129

Relationship N/A  
Status 509(a)(1)  
Purpose Supporting indigenous rainforest peoples' protection  
Amount \$5,000

San Francisco Opera  
War Memorial Opera House  
301 Van Ness Ave, San Francisco, CA 94102  
Relationship N/A  
Status 509(a)(1)  
Purpose General budget  
Amount \$5,000

San Geronimo Valley Community Center  
P O Box 194, San Geronimo, CA 94963  
Relationship N/A  
Status 509(a)(1)  
Purpose Supporting local community center  
Amount \$3,000

J/P HaitianRelief Organization  
149 S Barrington Ave #364, Los Angeles, CA 90049  
Relationship N/A  
Status 509(a)(1)  
Purpose Haiti Relief  
Amount \$5,000

Doctors without Borders  
Medecins Sans Frontieres  
333 7<sup>th</sup> Avenue, 2<sup>nd</sup> Floor  
New York, NY 10001  
Relationship N/A  
Status 509(a)(1)  
Purpose Haiti Relief  
Amount \$10,000

Mercy Corps  
45 SW Ankeny Street, Portland, OR 97204  
Relationship N/A  
Status 509(a)(1)  
Purpose Haiti Relief  
Amount \$10,000

**TOTAL CHARITABLE CONTRIBUTIONS: 56,000**