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Form **990-PF**

Department of the Treasury

Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2010

For	calendár	year 2010, or tax year beginning	, and ending					
G	Check all t	that apply Initial return	Initial return of a fo	rmer public ch	arity	Final return		
		Amended return	Address chang	ge		Name change		
Na	me of fou	ndation				A Employer identification	number	
		EDMUND AND MARY SHEA				95-4107214	:	
Nu		treet (or PO box number if mail is not delivered to stree	t address)]	Room/suite	B Telephone number	0.4.1	
		655 BREA CANYON ROAD	 _			(909)594-0		
Cit	-	state, and ZIP code WALNUT, CA 91789				C If exemption application is p		
						D 1. Foreign organization:	s, check here	
'T-	–	e of organization X Section 501(c)(3) e		•		Foreign organizations me check here and attach or	omputation	
		value of all assets at end of year J Account	Other taxable private foundaing method X Cash		-1	E If private foundation sta		
		·	ther (specify)	Accru	ar	under section 507(b)(1	•	
	•\$	6,797,654. (Part I, cold		1200		F If the foundation is in a		
_	APP E An	ialysis of Revenue and Expenses	T			under section 507(b)(1	(d) Disbursements	
119	Th) لنستستن	ne total of amounts in columns (b), (c), and (d) may not cessarily equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net invi		(c) Adjusted net income	for chantable purposes (cash basis only)	
	T	ntributions, gifts, grants, etc., received	92,377.			N/A	(cash basis only)	
	ı	ck if the foundation is not required to attach Sch B	327011			477.24		
	a Inter	rest on savings and temporary	126.		126.		STATEMENT 1	
		dends and interest from securities	218,937.	218	937.		STATEMENT 2	
	i	ss rents			,			
	D Net	rental income or (loss)		····		7		
_		gain or (loss) from sale of assets not on line 10	569,511.					
Ž	Gros	ss sales price for all 1,774,174.						
Revenue	ł	ital gain net income (from Part IV, line 2)		569	,511.			
α	8 Net	short-term capital gain						
		ome modifications	i i					
		ss sales less returns allowances	.,					
	b Less	Cost of goods sold				11		
	c Gro	ss profit or (loss)						
	11 Othe	er income	2,931.		,931.		STATEMENT 3	
	12 Tota	al. Add lines 1 through 11	883,882.	791	,505.			
		pensation of officers, directors, trustees, etc	0.		0.		0.	
		er employee salaries and wages						
Ś	3	sion plans, employee benefits						
enses	16a Lega							
Kpe		Oulitailu lees []						
e E		er professional fees rest 8 NOV 1 4 2011						
ţį		15-1	12,159.		,159.	· · · · · · · · · · · · · · · · · · ·	0.	
str		1 1	12,139.		,139.	· + +-7		
Ë		reciation and deptetion : N, UT						
Adn		rel, conferences, and meetings	-					
힏		ting and publications						
ā		er expenses STMT 5	84,551.	8.4	,551.		0.	
ati.		Il operating and administrative	01/331.	. 01	7331.			
Operating and Administrative Expe		enses. Add lines 13 through 23	96,710.	86	,710.		0.	
ŏ	•	tributions, gifts, grants paid	610,170.		,,10.		610,170.	
		expenses and disbursements.	010/1/01				520,2.00	
		lines 24 and 25	706,880.	86	,710.		610,170.	
		tract line 26 from line 12	, 50, 500.		,		1 2 2 7 2 . 0 4	
		ss of revenue over expenses and disbursements	177,002.					
		investment income (if negative, enter -0-)	"	704	,795.	/		
		sted net income (if negative, enter -0-)	,			N/A		

023501 12-07-10 LHA For Paperwork Reduction Act Notice, see the instructions

Form 990-PE (2016

SCANNEC NOV 1 6 2011

Part II Balance Sheets Atlached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of	f year
FOTE	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
1	Cash - non-interest-bearing	2,756.	48,530.	48,530.
2	Savings and temporary cash investments	448,854.	927,307.	927,307
3	Accounts receivable ►			
	Less allowance for doubtful accounts			
4	Pledges receivable ►			1
	Less allowance for doubtful accounts ▶		İ	
5	Grants receivable	-		
6	Receivables due from officers, directors, trustees, and other			
"	disqualified persons			
١,	Other notes and loans receivable			· · · · · · · · · · · · · · · · · · ·
7	Less allowance for doubtful accounts		1	
8 9	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
1102	Investments - U.S. and state government obligations	515 046	1 000 070	0 774 416
	Investments - corporate stock STMT 7	2,517,046.	1,292,870.	2,774,416
0	Investments - corporate bonds STMT 8	10,044.	10,044.	0
11	Investments - land, buildings, and equipment basis		1	
1	Less accumulated depreciation			
12	Investments - mortgage loans			
13	Investments - other STMT 9	1,921,842.	2,798,200.	3,047,401
14	Land, buildings, and equipment basis ▶			
Ì	Less: accumulated depreciation			
15	Other assets (describe			
	·			
16	Total assets (to be completed by all filers)	4,900,542.	5,076,951.	6,797,654
17				
18	Grants payable			
19	Deferred revenue			
19 20 21	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable			
22	Other liabilities (describe)			
22	Other namines (describe			
23	Total liabilities (add lines 17 through 22)	0.	0.	
123	Foundations that follow SFAS 117, check here			
	and complete lines 24 through 26 and lines 30 and 31.			
24	Unrestricted			
25				
İ	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here			
1	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.	
25 26 27 28 29 30	Retained earnings, accumulated income, endowment, or other funds	4,900,542.	5,076,951.	
30	Total net assets or fund balances	4,900,542.	5,076,951.	
31	Total liabilities and net assets/fund balances	4,900,542.	5,076,951.	
art	Analysis of Changes in Net Assets or Fund Ba	lances		
Total	net assets or fund balances at beginning of year - Part II, column (a), line 3	0		
	t agree with end-of-year figure reported on prior year's return)	-	1	4,900,542
	amount from Part 1, line 27a		2	177,002
	increases not included in line 2 (itemize)		1 - t	0
	increases not included in line 2 (itemize)		3	5,077,544
	•	SEE STAT	PEMENT 6	593
	eases not included in line 2 (itemize)			
rotai	net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	umn (b), line 30	6	5,076,951

023511

(a) List and describe 2-story brick wareh	d Losses for Tax on Ir the kind(s) of property sold (e g ouse, or common stock, 200 sho	., real estate,	r micoille	[P-	ow acquired Purchase Donation	(c) Date a (mo , da	cquired iy, yr)	(d) Date sold (mo , day, yr)
1a CHE AMERICANE	IMA MENTAL							
b SEE ATTACHED S	STATEMENT			-		_		
<u>c</u>			·					
<u>d</u>			.					<u> </u>
<u>e</u>	(f) Depression allowed	(11) 000		┸╾┰	i	/b\ C-		· · · · · · · · · · · · · · · · · · ·
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale			. ,	in or (loss) (f) minus (
a				·				
b								
С								
d 1 774 174			1 004 66	_				F.CO. F.1.1
e 1,774,174.		1	1,204,66	3.				569,511.
Complete only for assets showing g		1		_		l) Gains (Co l (k), but n		
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col (i)		CO		from col (
a		 		\neg				·····
b								
C								
ď								10 FL.
e						-		569,511.
	(If gain, also enter	r in Doet I. lino	7	7				
2 Capital gain net income or (net capita	I loss) { If gain, also enter of the loss	i ili Part I, ilile i- in Part I, line	7	1	2			569,511.
	•		•	7				
3 Net short-term capital gain or (loss) a if gain, also enter in Part I, line 8, coli		10 (6)						
If (loss), enter -0- in Part I, line 8	inii (c)			 	3		N/A	
Part V Qualification Und	er Section 4940(e) for	Reduced	Tax on Net	Inve	stment Inc	come		
f section 4940(d)(2) applies, leave this p Was the foundation liable for the section f "Yes," the foundation does not qualify t	4942 tax on the distributable am	mplete this pa	ırt					Yes X No
1 Enter the appropriate amount in each	column for each year, see instr	uctions before	making any entrie	es				(4)
(a) Base period years	(b)			(c)			Distrib	(d) oution ratio
Calendar year (or tax year beginning ii			Net value of no			, ,	col (b) div	rided by col (c))
2009		4,330.			378,232			.073320
2008		8,527.			433,905			.097690
2007		6,381.			801,681			.107205
2006		5,384.			047,257			147303
2005	66	9,263.		6,	912,306) •		.096822
								F22240
2 Total of line 1, column (d)	•	•				2		.522340
Average distribution ratio for the 5-ye		on line 2 by 5,	or by the number	of yea	rs			104460
the foundation has been in existence	if less than 5 years					3		.104468
Enter the net value of nonchantable-u	se assets for 2010 from Part X.	line 5				4		6,197,751 <u>.</u>
					•			
Multiply line 4 by line 3						5		647,467.
Enter 1% of net investment income (1	% of Part I, line 27b)					6		7,048.
Add lines 5 and 6						7		654,515.
Enter qualifying distributions from De	d VII. line 4		·					610,170.
Enter qualifying distributions from Pa			-	••	_	8		010/1/00
If line 8 is equal to or greater than line See the Part VI instructions	7, check the box in Part VI, line	1b, and comp	lete that part using	g a 1%	tax rate.			

Forn	n 990-PF (2010) EDMUND AND MARY SHEA FAMILY FOUNDATION 95-4107			Page 4
Pε	ert VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see i	nstru	ction	1s)
1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1			
	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1%	1	4,0	96.
	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).			
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
3	Add lines 1 and 2	1.	4,0	96.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	1	4,0	96.
6	Credits/Payments Credits/Payments	- 1111-1-1		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 6a 12,616.			
	Exempt foreign organizations - tax withheld at source			
	Tax paid with application for extension of time to file (Form 8868) 6. 6,000.			
	Backup withholding erroneously withheld			
	Total credits and payments Add lines 6a through 6d	1	8.6	16.
8	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached			
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed			
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		4.5	20.
	Enter the amount of line 10 to be Credited to 2011 estimated tax 4,520 • Refunded 11		-,-	0.
	ent VII-A Statements Regarding Activities			- • •
			Yes	No
14	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?	1a	103	X
	***	1b		X
U	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	<u>'''</u>		
	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.	4.		х
	Did the foundation file Form 1120-POL for this year?	1c		
a	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation ► \$ 0. (2) On foundation managers ► \$ 0.			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			
_	managers ▶\$0.		; i	v
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
_	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or			v
_	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		
	If "Yes," has it filed a tax return on Form 990-T for this year?	4D		v
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
_	If "Yes," attach the statement required by General Instruction T.			
- 5	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	By language in the governing instrument, or	-		-
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law	_	v	
	remain in the governing instrument?	6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year?	7	Х	
	If "Yes," complete Part II, col. (c), and Part XV.			
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	CA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)			
	of each state as required by General Instruction G? If "No," attach explanation	8b	Χ	
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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10		X
	For	m 990	-PF(2010)

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Part VIII—3 Statements Regarding Activities for Which Form 4720 May Be Required (continued) \$\frac{1}{2}\$ \text{ jump to propagating a characteristic influence legislation (section 4945(s))? \text{ yets } \text{ No} \\ (2) \text{ influence the eductions of any specific public election (see section 4945(s))? \text{ yets } \text{ No} \\ (3) \text{ Provide a great to an inderdual for travel; study, or other similar purposes? \text{ yets } \text{ No} \\ (4) \text{ Provide a great to an inderdual for travel; study, or other similar purposes? \text{ yets } \text{ No} \\ (5) \text{ Provide a great to an inderdual not reliave; study, or other similar purposes? \text{ yets } \text{ No} \\ (5) Provide a great to an inderdual not her than a characteristic, expansion described in section \text{ 509(a(1), (2) or (3) or section 4940(s)(2)? \\ (5) \text{ Provide a great to an inderdual not her than a characteristic (1) and the provided of the second of creately to children or animals? \text{ In any purpose of the reliable of the second of the second of creately to children or animals? \text{ In any purpose of the reliable of any purpose of the reliable of the second of the second of creately to children or animals? \text{ In any purpose of the reliable of the second of the s	Form 990-PF (2010) EDMUND AND MARY SHEA FA			95-41072	14 Page 6
(1) Carry on propaganta, or otherwas attempt to influence legistation (see section 4945(s))? (2) Influence the outcomer of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an individual for travel, study, or other similar purposes? (5) Provide for any purpose other than enlipsions, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? 8) In any answer is 7% to \$(11)(-1), dut any of the transactions fail to qualify under the exceptions described in Regulations section \$3.4945 or in a current notice regarding disaster assistance cache here 9 If the answer is 7% to so (11)(-1), dut any of the transactions (see indiructions)? 10 If Yes, attach the statemant required by Regulations section \$3.4945-5(d) 8 Did the foundation, during this year, recover any funds, directly or indirectly, to pay premiums on a personal benefit contract? 11 Yes, attach the statemant required by Regulations section \$3.4945-5(d) 8 Did the foundation, during this year, recover any funds, directly or indirectly, to pay premiums on a personal benefit contract? 12 Yes X No 13 Hi Yes, and the foundation one pay processed for indirectly, to a prohabed tax shelter transaction? 14 Yes or the foundation one any processed for indirectly, or a personal benefit contract? 15 At any time during the sky year, was the foundation aparty to a prohabed tax shelter transaction? 16 Yes X No 17 Yes X No 18 Hi Yes, and the foundation one any processed or indirectly, or a personal benefit contract? 18 Yes of the foundation one any processed or have any net morner attribubble to the transaction? 19 Yes X No 19 Yes X No 20 N	Part VII-B Statements Regarding Activities for Which	Form 4720 May Be	Required (contin	ued)	
(2) Inflaence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration draw? Yes No	5a During the year did the foundation pay or incur any amount to				
any voter registration drive? (3) Prevets a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charatoble, etc. organization described in section 509(a)(1), (2), or (3), or section 4940(c)(2)? (5) Provide for any purpose offer any purpose of any	(1) Carry on propaganda, or otherwise attempt to influence legislation (secti	on 4945(e))?	Ye	es X No	1 1
(3) Provide a grant to an individual for Lavek study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc. organization described in section 5096(h1), (2), or (3), or section 4940(h)(2)? (5) Provide for any purpose other than religious, charitable, sountific, Merary, or educational purposes, or for the prevention of cruesty to children or namise? bit it any answer is "Yes" to \$(1)+(3), old say of the transactions fail to qualify under the exceptions described in Regulations section \$3.495 or in a current notice regarding diseaster assistance check here if the answer is "Yes" to elegistics \$(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section \$3.4945-5(q) to 30 the foundation, duming the year, pay premiums, directly or indirectly, or ay premiums on a personal benefit contract? If "Yes "A look of the Form 8870. 73 at any time directly or midrectly, or a personal benefit contract? If "Yes "A look of the Form 8870. 74 at any time directly or midrectly, or a personal benefit contract? If "Yes "O db, the Form 8870. 75 at any time directly or midrectly, or a personal benefit contract? If "Yes "A look of the Form 8870. 75 at any time directly or midrectly, or a personal benefit contract? If "Yes "No bit the foundation directly or midrectly, or a personal benefit contract? If "Yes "No bit the foundation receive any proceeds or have any reflectly or indirectly, or a personal benefit contract? If "Yes "No bit the foundation processes any proceeds or have any reflectly or prohibided tax sheller transaction? Part VIII Paid Employees, and Contractors (a) Name and address of section, foundation managers and their compensation. (b) Title, and average hours per week devoked for position of the processes of the processes of the processes of the processes of the processes of the processes of the processes of the processes of the processes of the	(2) Influence the outcome of any specific public election (see section 4955),	or to carry on, directly or indir	rectly,		
(4) Provide a grant to an organization office than a charitable, etc., organization described in section 509(3)(1), (2), or (3), or section 4940(3)(2)? (5) Provide for any purpose other than entiplous, charitable, scentific, literary, or educational purposes, or for the prevention of cruelty to children or animals? If any answer is Yes 15 (3)(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)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? If the answer is Yes 10 question 54(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If Yes 106, the formation of the statement required by Regulations section 53.4945-5(d) 8a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? If Yes 106, the form 8807.	arly voter registration drive?		Ye	es X No	
S09(a)(1), (2), or (3), or section 4940(d)(2)? (S) Provide for any purpose other than religious, chantable, scientific, literary, or educational purposes, or for the prevention of cruety to children or animate? It is any answer as "ses' to 53(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53:4955 or in a current notice reparating disaster assistance (see instructions)? Organizations relying on a current notice reparating disaster assistance (see instructions)? Organizations relying on a current notice reparating disaster assistance (see instructions)? Organizations relying on a current notice reparating disaster assistance check here If we see that the statement required by Regulations section 53:4945-5(c) B oll the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract? If "Yes," attach the statement required by Regulations section 53:4945-5(c) B oll the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes to 6b, file Form 8870. At all my time during the tax year, was the foundation a party to a prohibited tax sheller transaction? If "Yes to 6b, file Form 8870. At all my time during the tax year, was the foundation a party to a prohibited tax sheller transaction? If "Yes to 6b, file Form 8870. At all my time during the tax year, was the foundation a party to a prohibited tax sheller transaction? If "Yes to 6b, file Form 8870. At all my time during the tax year, was the foundation a party to a prohibited tax sheller transaction? If "Yes to 6b, file Form 8870. At all my time during the tax year, was the foundation and party to a prohibited tax sheller transaction? If "Yes to 6b, file Form 8870. At all my time during the tax year, was the foundation and the tax shell transaction? If yes to define transaction? If yes to 6b, file Form 8870. At all my time during the tax year, was the foundation and the tax because it maint	(3) Provide a grant to an individual for travel, study, or other similar purpose	25?	Y ₀	es X No	
(6) Provide for any purpose other than relipious, chantable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animate? b if any answer is 7'es? to scity-155, did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a currient notice regarding desister assistance (see instructions)? N/A SB Organizations relying on a current notice regarding desister assistance (see instructions)? If Yes, a fattach the statement required by Regulations section 53.4945-5(c) SB Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal barefit contract? If Yes, a fattach the statement required by Regulations section 53.4945-5(c) SB Did the foundation, during the year, pay premiums, directly or indirectly, to a personal barefit contract? If Yes, a fattach the statement required by Regulations section 53.4945-5(c) SB Did the foundation, during the year, pay premiums, directly or indirectly, to a personal barefit contract? If Yes, a fattach the statement required by Regulations section 53.4945-5(c) SB Did the foundation, during the year, pay premiums, directly or indirectly, to a personal barefit contract? If Yes S Did the foundation of the statement required by the division of the foundation of the part of the foundation of the part of the foundation of the part of the foundation of the part of the foundation of the part of the foundation of the part of the foundation managers and their compensation. (a) Name and address of each employee paid more than 550,000 Did the foundation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (b) Tate, and average of the position of the highest-paid employees (other than those included on line 1). If none, enter "NONE." (c) Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Compensation of the highest-paid employees (other than tho	(4) Provide a grant to an organization other than a charitable, etc., organization	on described in section		ŀ	
b If any answer is "Yes" to \$6.1(1-15), did any of the transactions fail to qualify under the exceptions described in Regulations section \$3.4945 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here If the answer is "Yes" to describe \$1.400 in the grant? If "Yes," affacts the statement required by Regulations section \$3.4945-5(c) 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay pramiums on a personal benefit contract? If "Yes," affacts the statement required by Regulations section \$3.4945-5(c) 6a Did the foundation, during the year, receive any funds, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8370. At any time during the tax year, was the foundation a party to a prohibited tax sheller transaction? If "Yes "to 6b, file Form 8370. It is all officers, directions, frustees, foundation managers and their compensation. (a) Name and address (b) Title, and average hours paid Employees, and Contractors It is all officers, directions, frustees, foundation managers and their compensation. (b) Name and address (c) Employees, and Contractors DMUND H. SHEA, JR. PRESIDENT 2.00 0.0. 0.	509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	es X No	
b If any answer is "Yes" to \$6.1(1-15), did any of the transactions fail to qualify under the exceptions described in Regulations section \$3.4945 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here If the answer is "Yes" to describe \$1.400 in the grant? If "Yes," affacts the statement required by Regulations section \$3.4945-5(c) 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay pramiums on a personal benefit contract? If "Yes," affacts the statement required by Regulations section \$3.4945-5(c) 6a Did the foundation, during the year, receive any funds, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8370. At any time during the tax year, was the foundation a party to a prohibited tax sheller transaction? If "Yes "to 6b, file Form 8370. It is all officers, directions, frustees, foundation managers and their compensation. (a) Name and address (b) Title, and average hours paid Employees, and Contractors It is all officers, directions, frustees, foundation managers and their compensation. (b) Name and address (c) Employees, and Contractors DMUND H. SHEA, JR. PRESIDENT 2.00 0.0. 0.	(5) Provide for any purpose other than religious, charitable, scientific, literar	y, or educational purposes, or	for .		
b If any answer is "Yes" to Sa(1)-(5), did any of the transactions fall to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here If the answer is "Yes" to question 54(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945-5(c) 8a Did the foundation, during the year, receive any funds, directly, or indirectly, on a personal benefit contract? If "Yes," attach the statement required by Regulations section 53.4945-5(c) 8b If "Yes," does, the Form 8870. 1b It is fundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes," dot the foundation during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes," dot the foundation during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes," dot the foundation during the year, was the foundation a party to a prohibited tax sheller transaction? It is tall officers, directors, trustees, Directors, Trustees, Foundation Managers, Highly Part Yill information About Officers, Directors, Trustees, Foundation Managers, Highly It is tall officers, directors, trustees, foundation managers and their compensation. (a) Name and address (b) Title, and average hours per week devoted to position of the paid of the pa		, , ,		es X No	
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otal number of other employees paid over \$50,000 . ▶ 0		- devoted to position		compensation	allowances
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	otal number of other employees paid over \$50,000			. ▶	0
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Form 990-PF (2010) EDMUND AND MARY SHEA FAMILY FOUND	DATION 95-	4107214 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundat Paid Employees, and Contractors (continued)	ion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
` (a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	_	
	_	
T-1		D 0
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities	·	<u> </u>
Line and the second sec	and the formation of the second of the secon	
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic number of organizations and other beneficiaries served, conferences convened, research papers produced.	cal information such as the liced, etc	Expenses
1 N/A	-	
		0.
2		
3		
		
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on li	nes 1 and 2	Amount
1 N/A		
		0.
2		
		,
All other program-related investments See instructions		
3		
	1	

Total. Add lines 1 through 3

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations	s, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		 - -
а	Average monthly fair market value of securities	1a	3,129,278.
b		1b	677,464.
C	Fair market value of all other assets	10	
d	Total (add lines 1a, b, and c)	1d	2,485,391. 6,292,133.
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	6,292,133.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	94,382.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	6,197,751.
6	Minimum investment return. Enter 5% of line 5	6	309,888.
P	pistributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part.)	id certain	
1	Minimum investment return from Part X, line 6	1	309,888.
2a	Tax on investment income for 2010 from Part VI, line 5		
b	Income tax for 2010. (This does not include the tax from Part VI)		
C	Add lines 2a and 2b	2c	14,096.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	14,096. 295,792.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	295,792.
6	Deduction from distributable amount (see instructions)	6	0.
<u>7</u>	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	295,792.
P	art XII Qualifying Distributions (see Instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		610 170
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	_1a	610,170.
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 chantable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)		
	Cash distribution test (attach the required schedule)	3b	610 170
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	610,170.
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	(10 170
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	610,170.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q 4940(e) reduction of tax in those years	ualifies f	or the section

Page 9

Part XIII Undistributed Income (see instructions)

				
,	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI,	Colpas	10070 pilot to 2000	2000	
line 7				295,792.
2 Undistributed income, if any, as of the end of 2010		·		
a Enter amount for 2009 only			0.	
b Total for prior years		_		
3 Excess distributions carryover, if any, to 2010		0.	114 115 115 115 115	,
a From 2005 329, 021.				
b From 2006 798, 443.				
c From 2007 459, 345.				
d From 2008 314,511.				
e From 2009 130,000.				
f Total of lines 3a through e	2,031,320.			
4 Qualifying distributions for 2010 from				
Part XII, line 4 ▶\$ 610,170.				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior		_		,
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			205 702
d Applied to 2010 distributable amount	314,378.		~~~	295,792.
e Remaining amount distributed out of corpus	314,376.			0.
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,345,698.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.	****	
c Enter the amount of prior years'				
undistributed income for which a notice of deficiency has been issued, or on which				
the section 4942(a) tax has been previously				
assessed		0.		
d Subtract line 6c from line 6b Taxable		0.		
amount - see instructions e Undistributed income for 2009 Subtract line		0.		
4a from line 2a. Taxable amount - see instr			0 .	
f Undistributed income for 2010 Subtract				
lines 4d and 5 from line 1. This amount must	1	Į		
be distributed in 2011				0.
7 Amounts treated as distributions out of				, , , , , , , , , , , , , , , , , , , ,
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005				`
not applied on line 5 or line 7	329,021.			·
9 Excess distributions carryover to 2011	0.016.655			,
Subtract lines 7 and 8 from line 6a	2,016,677.			
0 Analysis of line 9.	1			
a Excess from 2006 798, 443.				
b Excess from 2007 459,345. c Excess from 2008 314,511.	***************************************			
c Excess from 2008 314,511. d Excess from 2009 130,000.				
e Excess from 2010 314, 378.				
		<u></u>	1	Form 000-DE (2010)

EDMUND AND MARY SHEA FAMILY FOUNDATION

Part XIV Private Operating F		nstructions and Part		N/A	2/214 Page 1
1 a If the foundation has received a ruling o		-		11/ 21	
foundation, and the ruling is effective fo		• •	S		
b Check box to indicate whether the found		•	d in section	4942(j)(3) or 494	12(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	Ing roundation describe	Prior 3 years	1 4342())(0) 01 1 434	*Z()/(O)
income from Part I or the minimum	(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Totai
investment return from Part X for		(-/	(1)	(-,	(0) 10121
each year listed					
b 85% of line 2a	_				
c Qualifying distributions from Part XII,				_	
line 4 for each year listed			-		
d Amounts included in line 2c not				-	
used directly for active conduct of					
exempt activities					
e Qualifying distributions made directly	·				
for active conduct of exempt activities					
Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the					
alternative test relied upon a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying					
under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter					
2/3 of minimum investment return shown in Part X, line 6 for each year					
listed .					
c "Support" alternative test - enter:					
(1) Total support other than gross	I				
investment income (interest, dividends, rents, payments on	I			İ	
securities loans (section					
512(a)(5)), or royalties)	<u> </u>				
(2) Support from general public					
and 5 or more exempt organizations as provided in					
section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from					
an exempt organization				ļ	
(4) Gross investment income			***		··· <u>·</u> ···
Part XV Supplementary Info			/ If the foundation	n had \$5,000 or mo	re in assets
at any time during the		instructions.)			
1 Information Regarding Foundation	•	Aba = 00/ -64b - 4-4-1			
 a List any managers of the foundation who year (but only if they have contributed m 	ore than \$5.000\. (See s	than 2% of the total col section 507(d)(2) \	ntributions received by the	toundation before the close	or any tax
NONE					
b List any managers of the foundation who	nwn 10% or more of th	ne stock of a corporation	/or an equally large ports	on of the ownership of a par	tnerchin or
other entity) of which the foundation has	a 10% or greater intere	st.	i (or an equally large porti	on of the ownership of a par	mership or
NONE					
2 Information Regarding Contribution	on, Grant, Gift, Loan	, Scholarship, etc., F	Programs:		
Check here 🕨 🗓 If the foundation or				not accept unsolicited reque	sts for funds If
the foundation makes gifts, grants, etc. (see instructions) to indiv	viduals or organizations	under other conditions, co	omplete items 2a, b, c, and o	1
a The name, address, and telephone numb	er of the person to who	m applications should b	e addressed.		
,					
·					
b The form in which applications should be	submitted and informa	tion and materials they	should include		
c Any submission deadlines					
d Any restrictions or limitations on awards	, such as by geographic	al areas, charitable fields	s, kınds of ınstitutions, or o	other factors	
			. ,		200 ==
023601 12-07-10				F	orm 990-PF (2010)

Grants and Contributions Paid During the Y	If recipient is an industrial	, <u></u>		
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid dunng the year	or substantial contributor	тестрісті		
a rad daring the year				
		,		
SEE STATEMENT 10				
Total			▶ 3a	610,17
Approved for future payment				
NONE				
	i i			Ī
			į	

Part XVI-A	Analysis of Income-Producing	Activities
· ~ · · · · · · · · · · · · · · · · · ·	in all the second of the secon	70011100

, -					
Enter gross amounts unless otherwise indicated	Unrelated be (a) Business	usiness income (b)	Excluded b	(d)	(e) Related or exempt
1 Program service revenue	code	Amount	code	Amount	function income
a					
b					
c					
d		· · · · · · · · · · · · · · · · · · ·			
е					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments		" -			.
3 Interest on savings and temporary cash					
investments			14	126.	
4 Dividends and interest from securities		-	14	218,937.	
5 Net rental income or (loss) from real estate		, , , , , , , , , , , , , , , , , , , ,			****
a Debt-financed property	1.	<u> </u>			
b Not debt-financed property		_			
6 Net rental income or (loss) from personal			 		
property					
7 Other investment income	525990	955.	18	1,976.	
8 Gain or (loss) from sales of assets other					
than inventory			18	569,511.	
9 Net income or (loss) from special events				7.22	
10 Gross profit or (loss) from sales of inventory					
11 Other revenue				_	
a					
b	_	· 	 		
	-		 		
d	_				
e	_		 		
12 Subtotal Add columns (b), (d), and (e)	_	955.		790,550.	0
13 Total. Add line 12, columns (b), (d), and (e)	i	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	LI	13	
(See worksheet in line 13 instructions to verify calculations		•	•		7317303
Part XVI-B Relationship of Activitie		plishment of Ex	cempt Pu	urposes	
Line No. Explain below how each activity for which is the foundation's exempt purposes (other the	ncome is reported in co ian by providing funds t	lumn (e) of Part XVI-A for such purposes)	contributed	importantly to the accomp	lishment of
	-				
				 	
		-			
		······································			
					
					·-
					

Pa	rt XVII	Information Re Exempt Organ		and Transactions a	nd Relationships With Nonch	aritable		90 10
1	Did the o	rganization directly or indi	rectly engage in any of the followi	ng with any other organizatio	n described in section 501(c) of	1	es	No
)(3) organizations) or in section 5					
а			ation to a noncharitable exempt o					
	(1) Cash			3		1a(1)	Ì	Х
	(2) Othe	rassets	•			1a(2)		X
b		nsactions		•	•	14(5/		
	(1) Sale	s of assets to a noncharita	ble exempt organization			1b(1)	İ	Х
			ncharitable exempt organization		·-	1b(2)		X
		al of facilities, equipment,		•		1b(3)		X
		nbursement arrangements		•		1b(4)		X
	• •	is or loan guarantees		•		1b(5)		X
		-	mbership or fundraising solicitati	ons		1b(6)	-+	X
C			iling lists, other assets, or paid en		•	10		X
			- · · · · · · · · · · · · · · · · · · ·		ays show the fair market value of the good:		1. te	
	or service	es given by the reporting fo		ved less than fair market value	e in any transaction or sharing arrangement		,	
(a) ⊔		(b) Amount involved	(c) Name of noncharitabl		(d) Description of transfers, transactions, at	nd shanno arrai	ngemer	nts
<u></u>			N/A		(1) Sees (past of transiers, transacrating trans	id shaing and	gerrier	

			· · · · · · · · · · · · · · · · · · ·					—
								
		· · · · · · · · · · · · · · · · · · ·						
			· · · · ·	· · · · · · · · · · · · · · · · · · ·				
		··						
		···		· · · · · · · · · · · · · · · · · · ·				
					-			
		· 				-		
					 			
		· · -						
	ın section		ly affiliated with, or related to, one than section 501(c)(3)) or in sected to the section for		ations described	Yes	X	No No
		(a) Name of orga		(b) Type of organization	(c) Description of relation	ıshıp		
		N/A						
	-							
		<u> </u>						
								
				" -				
Sig He	in and	complete. Declaration of prepar	er (other than taxpayer or fiduciary) is b	ing accompanying schedules and ased on all information of which pr		celief, it is true,		t,
		Gignature of officer or true	- 	Date	Title			
Pai	н	Print/Type preparer's nai	1		Date Check if PTIN			
Pre	parer Only	Firm's name ► J.F			Firm's EIN ►			
	•	Firm's address ► 655	BREA CANYON R	OAD				
			LNUT, CA 91789	· -	Phone no 909-	-594-9	500)
	•			· · · · · · · · · · · · · · · · · · ·		orm 990-		

023622 04-26-11

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

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

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

OMB No 1545-0047

2010

Employer identification number

EDMUND AND MARY SHEA FAMILY FOUNDATION 95-4107214 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 X 501(c)(3) exempt private foundation Form 990-PF 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 X 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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

	4	4	
Page	Lof	of Part	ı

Name of organization

Employer identification number

EDMUND AND MARY SHEA FAMILY FOUNDATION

95-4107214

Part I	Contributors (see instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	EDMUND H. SHEA, JR. 655 BREA CANYON ROAD WALNUT, CA 91789	\$92,377.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Occash Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
,		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)

023452 12-23-10

Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

of Part II

Name of organization

Employer identification number

EDMUND AND MARY SHEA FAMILY FOUNDATION

95-4107214

Part II	Noncash Property (see instructions)		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		 \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
.			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-			
		 \$	
(a)			
No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-			
-			
1453 12-23-1		\$	990, 990-EZ, or 990-PF) (

Name of organization **Employer identification number** EDMUND AND MARY SHEA FAMILY FOUNDATION 95-4107214 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. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee --(a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

Part IV Capital Gains and Lo	sses for Tax on Investment Income				
	describe the kind(s) of property solonck warehouse, or common stock, 20		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a 1,000 SHARES -	SALESFORCE.COM	INC.	D	10/15/99	01/05/10
	ERICAN INTERNATI		P	10/29/04	
	ERICAN INTERNATI		P	11/01/04	
	MERICAN INTERNAT	IONAL GROUP INC	P	11/02/04	
e 76,000 SHARES			P	04/04/02	
f 45,000 SHARES			P	04/05/02	
g 5,000 SHARES -			P	04/04/02	
h 5,000 SHARES -			P	04/04/02	06/28/10
FROM PARTNERSH			P		
FROM PARTNERSH			P		
k CAPITAL GAINS	DIVIDENDS				
_!					
<u>m</u>					
<u>n</u>					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		Gain or (loss) lus (f) minus (g)	
a 73,566.		1,750.			71,816.
b 2,626.		92,100.			<89 , 474.>
c 1,751.		61,400.			<59 , 649.>
d 3,501.		122,780.			119,279.>
e 874,000.		510,910.			363,090.
f 517,500.		348,498.			169,002.
g 43,981.		33,613.			10,368.
h 59,342.		33,612.			25,730.
18,022.					18,022.
177,169.				<u>.</u>	177,169.
k 2,716.			<u>-</u>		2,716.
1					
m					
n			*		
Complete only for assets showin	g gain in column (h) and owned by t	he foundation on 12/21/60		/6 1 /1-11	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (l) over col (j), if any	Gains (excess o	ses (from col (h)) of col (h) gain over ot less than "-0-")	col (k),
2		(1), 11 2119			71,816.
<u>a</u> <u>b</u>				· · · · · · · · · · · · · · · · · · ·	$\frac{71,810.}{89,474.}$
C					<59,649.>
<u>d</u>					119,279.>
e					363,090.
1					169,002.
g					10,368.
h					25,730.
1					18,022.
					177,169.
k					2,716.
1					
m					_
n					
0		-			
2 Capital gain net income or (net cap3 Net short-term capital gain or (loss	s) as defined in sections 1222(5) and	<u> </u>			569,511.
If gain, also enter in Part I, line 8, c If (loss), enter "-0-" in Part I, line 8	olumn (c)	} 3		N/A_	

(Rev November 2009) Department of the Treasury Internal Revenue Service

At-Risk Limitations

► Attach to your tax return. ► See separate instructions. OMB No 1545-0712

Attachment Sequence No

31

Name(s) shown on return **EDMUND AND MARY SHEA FAMILY FOUNDATION**

Identifying number 95-4107214

	outon of activity (see page 2 of the instructions)			
	MARKET NEUTRAL FUND, LTD			
Par		Amo	ounts.	
	See page 2 of the instructions.			
1	Ordinary income (loss) from the activity (see page 2 of the instructions)	1		
2	Gain (loss) from the sale or other disposition of assets used in the activity (or of your interest in	Sales in		
	the activity) that you are reporting on:	/20g		
а	Schedule D	2a	-159	00
b	Form 4797	2b		
С	Other form or schedule	2c		_
3	Other income and gains from the activity, from Schedule K-1 of Form 1065, Form 1065-B, or			
-	Form 1120S, that were not included on lines 1 through 2c	3	29	00
4	Other deductions and losses from the activity, including investment interest expense allowed			
•	from Form 4952, that were not included on lines 1 through 2c	4	(321	00)
5	Current year profit (loss) from the activity. Combine lines 1 through 4. See page 3 of the	-	, , ,	
•	instructions before completing the rest of this form	5	-451	00
Part				- 00
		T	loung uno part.	
6	Adjusted basis (as defined in section 1011) in the activity (or in your interest in the activity) on the		0	00
7	first day of the tax year. Do not enter less than zero	6	0	- 00
7	Increases for the tax year (see page 3 of the instructions)	7		
8	Add lines 6 and 7	8	0	00
9	Decreases for the tax year (see page 4 of the instructions)	9		
10a	Subtract line 9 from line 8	11 (2 122		
b		The state of		
	Otherwise, enter -0- and see Pub. 925 for information on the recapture rules	10b	[0	00
Part		or the	prior year, see	
	page 4 of the instructions.			
11	Investment in the activity (or in your interest in the activity) at the effective date. Do not enter			
	less than zero	11		
12	Increases at effective date	12		
13	Add lines 11 and 12	13		
14	Decreases at effective date	14		
15	Amount at risk (check box that applies):			
а	At effective date. Subtract line 14 from line 13. Do not enter less than zero.			
b	From your prior year Form 6198, line 19b. Do not enter the amount from line 10b of	15		
	your prior year form.	1100		
16	Increases since (check box that applies):	ā t		
а	☐ Effective date b ☐ The end of your prior year	16		
17	Add lines 15 and 16	17		
18	Decreases since (check box that applies):		-	
а	Effective date b The end of your prior year	18		
19a	Subtract line 18 from line 17			
_				
b	If line 19a is more than zero, enter that amount here and go to line 20. Otherwise, enter -0- and	-1-6-		
Part	see Pub. 925 for information on the recapture rules	19b		
20	Amount at risk. Enter the larger of line 10b or line 19b	20	0	00
21	Deductible loss. Enter the smaller of the line 5 loss (treated as a positive number) or line 20.		<u> </u>	١.
	See page 8 of the instructions to find out how to report any deductible loss and any carryover.	21	(0	00)
	Note: If the loss is from a passive activity, see the Instructions for Form 8582, Passive Activity Loss Lin	nitation	ns. or the Instruction	ns for
	Form 8810, Corporate Passive Activity Loss and Credit Limitations, to find out if the loss is allo			
	rules. If only part of the loss is subject to the passive activity loss rules, report only that part			

Cat No 50012Y

whichever applies

FORM 990-PF, INTEREST ON SAVINGS A	AND TEMPORARY CA	ASH INVESTMENTS	STATEMENT 1
SOURCE			AMOUNT
JP MORGAN CHASE PRIME BROKER			20.
MORGAN STANLEY BROKER SCOTTRADE BROKER			78. 28.
TOTAL TO FORM 990-PF, PART I, LINE	E 3. COLUMN A		126.
	·		
FORM 990-PF DIVIDENDS AND	INTEREST FROM	SECURITIES	STATEMENT 2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
AG GECC PUBLIC PRIVATE INVESTMENT FUND LP ALTRIA GROUP, INC. FROM PARTNERSHIPS HCP, INC. HCP, INC. JP MORGAN 100% UST SMM RESERVE KRAFT FOODS, INC. PHILLIP MORRIS INTERNATIONAL WELLS FARGO BANK TOTAL TO FM 990-PF, PART I, LN 4	3,133. 12,212. 152,447. 31,711. 2,716. 119. 2,890. 16,422. 3.	0. 0. 0. 0. 2,716. 0. 0. 0. 0.	3,133. 12,212. 152,447. 31,711. 0. 119. 2,890. 16,422. 3.
FORM 990-PF O	THER INCOME		STATEMENT 3
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- SMENT INCOME	
AG REALTY III PINNACLE NATURAL RESOURCE LP ROI PARTNERS, LP CARE MARKET NEUTRAL FUND, LLC OTHER INCOME FROM PASSTHROUGH ROYALTY INCOME	2		•
TOTAL TO FORM 990-PF, PART I, LINE	11 2,9	931. 2,931	•

FORM 990-PE	TAX	ES	S	TATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES FRANCHISE TAX BOARD INTERNAL REVENUE SERVICE	2,074. 85. 10,000.	2,074. 85. 0.		0. 0. 0.
TO FORM 990-PF, PG 1, LN 18	12,159.	2,159.		0.
FORM 990-PF	OTHER E	XPENSES	S	TATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT EXPENSES FROM PSHIPS MISCELLANEOUS OTHER INVESTMENT LOSS FROM PSHIPS	12,992. 6,854. 64,705.	12,992. 6,854. 64,705.		0.
TO FORM 990-PF, PG 1, LN 23	84,551.	84,551.		0.
FORM 990-PF OTHER DECREASI	ES IN NET AS	SETS OR FUND I	BALANCES S	TATEMENT 6
DESCRIPTION				AMOUNT
NONDEDUCTIBLE EXPENSE FROM PA	ASSTHROUGH			593.
TOTAL TO FORM 990-PF, PART I	II, LINE 5-			<u>5</u> 93.

FORM 990-PF	CORPORATE STOCK		STATEMENT 7
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
AES		191,348.	383,573.
PMC SIERRA		52,594.	425,205.
SONICWALL, INC.		0.	0.
ALTRIA GROUP, INC.		131,094.	211,732.
GILEAD SCIENCES, INC.		93,443. 553,569.	195,696.
HCP, INC. AMERICAN INTL GROUP		0.	1,066,910. 0.
SALESFORCE.COM		0.	0.
KRAFT FOODS, INC.		38,705.	78,491.
PHILIP MORRIS INTERNATIONAL		224,083.	403,857.
CUTERA INC		8,034.	8,290.
PD-LD, INC		0.	662.
TOTAL TO FORM 990-PF, PART I	I, LINE 10B	1,292,870.	2,774,416.
FORM 990-PF	CORPORATE BONDS		STATEMENT 8
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
ET OR			
ELOT		10,044.	0.
TOTAL TO FORM 990-PF, PART I	I, LINE 10C	10,044.	0.
	OTHER INVESTMENTS		0.
TOTAL TO FORM 990-PF, PART I	OTHER INVESTMENTS VALUATION	10,044.	0.
TOTAL TO FORM 990-PF, PART I	OTHER INVESTMENTS VALUATION	10,044.	STATEMENT 9

FORM 990-PF

STATEMENT 10

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT		AMOUNT
CAROLINAS HEALTH CARE FOUNDATION PO BOX 32861 CHARLOTTE, NC 28232		TAX EXEMPT	10,000.
CHANDLER SCHOOL 1005 ARMADA DRIVE PASADENA, CA 91103	NONE FURTHERANCE OF EXEMPT ACTIVITIES	TAX EXEMPT	750.
CHILDREN'S HOSPITAL OF ORANGE COUNTY PO BOX 10061 NEWPORT BEACH, CA 92658	NONE FURTHERANCE OF EXEMPT ACTIVITIES	TAX EXEMPT	250.
FOOTHILL FAMILY SERVICE 2500 E. FOOTHILL BLVD, SUITE 300 PASADENA, CA 91107	NONE FURTHERANCE OF EXEMPT ACTIVITIES	TAX EXEMPT	1,800.
FRIENDS OF ROBINSON GARDENS 1008 ELDEN WAY BEVERLY HILLS, CA 90210		ТАХ ЕХЕМРТ	420.
HARBOR DAY SCHOOL 3443 PACIFIC VIEW DRIVE CORONA DEL MAR, CA 92625	NONE FURTHERANCE OF EXEMPT ACTIVITIES	ТАХ ЕХЕМРТ	12,500.
HOOVER INSTITUTION STANFORD UNIVERISTY STANFORD, CA 94305	NONE FURTHERANCE OF EXEMPT ACTIVITIES	TAX EXEMPT	•
HUNTINGTON MEMORIAL HOSPITAL PO BOX 7013, 100 W. CALIFORNIA BLVD PASADENA, CA 91109	NONE FURTHERANCE OF EXEMPT ACTIVITIES	TAX EXEMPT	2,000.

GRANTS AND CONTRIBUTIONS

PAID DURING THE YEAR

EDMUND AND MARY SHEA FAMILY FOUNDATI	I ON	
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s 1	ESUIT SCHOOL OF THEOLOGY AT ANTA CLARA UNIVERISTY 735 LEROY AVENUE BERKELEY, CA 4709				TAX	EXEMPT	50,000.
F 6	OHN & COLLEEN MORRISSEY OUNDATION 55 BREA CANYON ROAD WALNUT, CA 1789	FURTHERANCE			TAX	EXEMPT	160,000.
P	CET ASSURANCE FUND O BOX 469028 ESCONDIDO, CA 2046	NONE FURTHERANCE ACTIVITIES	OF	EXEMPT	TAX	EXEMPT	100.
P	-LIFE FM O BOX 1561 SAN LUIS OBISPO, CA 3401			EXEMPT	TAX	EXEMPT	200.
1	OYOLA HIGH SCHOOL 901 VENICE BLVD. LOS ANGELES, A 90006			EXEMPT	TAX	EXEMPT	10,000.
4	AYFIELD JUNIOR SCHOOL 05 S. EUCLID AVE PASADENA, CA 1101			EXEMPT	TAX	EXEMPT	17,500.
₩ 4		FURTHERANCE		EXEMPT	TAX	EXEMPT	3,000.
5	AYFIELD SENIOR SCHOOL 00 BELLEFONTAINE ST. PASADENA, A 91105	NONE FURTHERANCE ACTIVITIES	OF	EXEMPT	TAX	EXEMPT	105,000.
S :	AYFIELD SENIOR SCHOOL - MAUREEN HEA SCHOLARSHIP FUND 00 BELLEFONTAINE ST. PASADENA, A 91105	FURTHERANCE			ТАХ	EXEMPT	·· - 700 -
.1	ATIONAL MULTIPLE SCLEROSIS OCIETY 117 PERIMETER CENTER WEST ROAD E101 ATLANTA, GA 30338	FURTHERANCE	OF	EXEMPT	TAX	EXEMPT	1,000.

EDMUND AND) MARY	SHEA	FAMIT.V	FOUNDATION
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NORTH LAKE TAHOE HISTORICAL SOCIETY PO BOX 6141 TAHOE CITY, CA 96145						
PASADENA ART ALLIANCE 464 E. WALNUT STREET, SUITE 226 PASADENA, CA 91101	NONE FURTHERANCE ACTIVITIES	OF	EXEMPT	TAX	EXEMPT	2,500.
PASADENA CONSERVATORY OF MUSIC 100 NORTH HILL PASADENA, CA 91106			EXEMPT	TAX	EXEMPT	100.
PASADENA GARDEN CLUB 1224 ARDEN ROAD PASADENA, CA 91106	NONE FURTHERANCE ACTIVITIES	OF	EXEMPT	TAX	EXEMPT	500.
POLYTECHNIC SCHOOL 1030 E. CALIFORNIA BLVD PASADENA, CA 91106	NONE FURTHERANCE ACTIVITIES	OF	EXEMPT	TAX	EXEMPT	7,500.
RETIREMENT FUND FOR ARCHDIOCESAN PRIESTS 3424 WILSHIRE BLVD LOS ANGELES, CA 90010	FURTHERANCE (EXEMPT	TAX	EXEMPT	500.
RONALD MCDONALD HOUSE CHARITIES OF GREATER LAS VEGAS 2323 POTOSI STREET LAS VEGAS, NV 89146	FURTHERANCE (EXEMPT	TAX	EXEMPT	1,000.
SAN LUIS OBISPO CHRISTIAN SCHOOL PO BOX 385, 525 CERRO ROMAULDO AVE SAN LUIS OBISPO, CA 93406		OF	EXEMPT	TAX	EXEMPT	750.
SEMESTER AT SEA PO BOX 400885 CHARLOTTESVILLE, VA 22904				TAX	EXEMPT_	2,000.
SPIRTUAL CARE GUILD OF CHILDRENS HOSPITAL LOS ANGELES PO BOX 50413 PASADENA, CA 91115	FURTHERANCE (OF	EXEMPT	TAX	ЕХЕМРТ	250.

EDMUND	AND	MARY	SHEA	FAMTT.V	FOUNDATTON

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ST. ANDREW CATHOLIC CHURCH 311 N. RAYMOND PASADENA, CA 91103		TAX EXEMPT	213,000.
ST. EDMUND'S NURSERY SCHOOL PO BOX 80038, 1175 SAN GABRIEL BLVD. SAN MARINO, CA 91118	FURTHERANCE OF EXEMPT	TAX EXEMPT	1,500.
TOGETHER IN MISSION 3424 WILSHRE BLVD LOS ANGELES, CA 90010	NONE FURTHERANCE OF EXEMPT ACTIVITIES	TAX EXEMPT	1,000.
UNIVERSITY OF SOUTHERN CALIFORNIA UNIVERSITY PARK LOS ANGELES, CA 90089	NONE FURTHERANCE OF EXEMPT ACTIVITIES	TAX EXEMPT	3,000.
YOUNG AND HEALTHY PO BOX 93397 PASADENA, CA 91109	NONE FURTHERANCE OF EXEMPT ACTIVITIES	TAX EXEMPT	250.
TOTAL TO FORM 990-PF, PART XV, LII	NE 3A		610,170.