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 calendar year 2010, or tax year beginning , and ending

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Name of foundation: VICTORIA S & BRADLEY L GEIST FOUNDATION

A Employer identification number: 99-0163400

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 3170, DEPT 715 | Room/suite

B Telephone number: (808) 694-4525

City or town, state, and ZIP code: HONOLULU, HI 96802-3170

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 39,622,338.

J Accounting method: [X] Cash ☐ Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis.)*

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

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	244.	244.		STATEMENT 1
	4 Dividends and interest from securities	948,951.	948,951.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	3,944,711.			
	b Gross sales price for all assets on line 6a 16,133,158.				
	7 Capital gain net income (from Part IV, line 2)		3,944,711.		
	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	4,893,906.	4,893,906.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	210,907.	158,180.		52,727.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 3	2,500.	750.		1,750.
	c Other professional fees				
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	5,104.	0.		5,104.
	22 Printing and publications				
	23 Other expenses STMT 4	166,000.	0.		165,750.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	384,511.	158,930.		225,331.
	25 Contributions, gifts, grants paid	1,615,254.			1,615,254.
	26 **Total expenses and disbursements.** Add lines 24 and 25	1,999,765.	158,930.		1,840,585.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	2,894,141.			
	b **Net investment income** (if negative, enter -0-)		4,734,976.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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6100427 791519 115024150 2010.03040 VICTORIA S & BRADLEY L GEIS 11502401

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing		866.	866.
	2 Savings and temporary cash investments	841,606.	857,395.	857,395.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	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 ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 5	26,883,501.	29,853,513.	38,764,077.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	27,725,107.	30,711,774.	39,622,338.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ 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 ▶ [X] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	27,725,107.	30,711,774.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 **Total net assets or fund balances**	27,725,107.	30,711,774.	
	31 **Total liabilities and net assets/fund balances**	27,725,107.	30,711,774.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	27,725,107.
2	Enter amount from Part I, line 27a	2	2,894,141.
3	Other increases not included in line 2 (itemize) ▶ RETURNED GRANTS	3	92,526.
4	Add lines 1, 2, and 3	4	30,711,774.
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	30,711,774.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	PUBLICLY TRADED SECURITIES	P		
b	CAPITAL GAINS DIVIDENDS			
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	16,049,303.		12,188,447.	3,860,856.
b	83,855.			83,855.
c				
d				
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				3,860,856.
b				83,855.
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	3,944,711.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	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 Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	1,832,859.	33,024,702.	.055500
2008	2,329,127.	39,094,323.	.059577
2007	2,240,238.	44,498,064.	.050345
2006	2,151,373.	41,975,248.	.051253
2005	1,915,909.	41,363,532.	.046319

2	**Total** of line 1, column (d)	2	.262994
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.052599
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	36,535,398.
5	Multiply line 4 by line 3	5	1,921,725.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	47,350.
7	Add lines 5 and 6	7	1,969,075.
8	Enter qualifying distributions from Part XII, line 4	8	1,840,585.

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 ▶ ☐ 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% of Part I, line 27b		1	94,700.
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	94,700.
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	94,700.
6	Credits/Payments:			
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a 24,393.		
b	Exempt foreign organizations - tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c 229,600.		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d		7	253,993.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☒ 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	159,293.
11	Enter the amount of line 10 to be: **Credited to 2011 estimated tax** ▶ 159,293. **Refunded** ▶		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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	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.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
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 bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
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.			
6	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 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	X	
	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) ▶ HI			
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	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 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

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

			Yes	No
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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ BANK OF HAWAII Telephone no. ▶ (808) 694-4525

Located at ▶ 130 MERCHANT ST, HONOLULU, HI ZIP+4 ▶ 96813

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

			Yes	No
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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 2010?	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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☒ No			
	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? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2010 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 2010.)* 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 2010?	4b		X

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 | 5b |

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? | 6b | | X

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

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

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? 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
BANK OF HAWAII 130 MERCHANT ST HONOLULU, HI 96813	CO-TRUSTEE 1.00	210,907.	0.	0.
GARY S. MORIMOTO 130 MERCHANT ST HONOLULU, HI 96813	CO-TRUSTEE 0.40	0.	0.	0.
CHARMAN J. AKINA 130 MERCHANT ST HONOLULU, HI 96813	CO-TRUSTEE 0.40	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

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

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		
Total number of others receiving over $50,000 for professional services ▶		0

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

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

Part IX-B **Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	0.

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	36,048,871.
b	Average of monthly cash balances	1b	1,042,904.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	37,091,775.
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	37,091,775.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	556,377.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	36,535,398.
6	**Minimum investment return.** Enter 5% of line 5	6	1,826,770.

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	1,826,770.
2a	Tax on investment income for 2010 from Part VI, line 5 — 2a: 94,700.		
b	Income tax for 2010. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	94,700.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,732,070.
4	Recoveries of amounts treated as qualifying distributions	4	92,526.
5	Add lines 3 and 4	5	1,824,596.
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	1,824,596.

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	1,840,585.
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	1,840,585.
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	0.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	1,840,585.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				1,824,596.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			1,319,750.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f **Total** of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ $ 1,840,585.				
a Applied to 2009, but not more than line 2a			1,319,750.	
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.			
d Applied to 2010 distributable amount				520,835.
e Remaining amount distributed out of corpus	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	0.			
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 amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 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 be distributed in 2011				1,303,761.
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	0.			
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				

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 2010, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

NONE

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

NONE

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

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

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

SEE STATEMENT POLICY-1

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

SEE STATEMENT POLICY-1

c Any submission deadlines:

SEE STATEMENT POLICY-1

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

SEE STATEMENT POLICY-1

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE STATEMENT GRANTS-1				1,340,254.
SEE STATEMENT SCHOL-1				275,000.
Total			▶ **3a**	1,615,254.
b *Approved for future payment*				
NONE				
Total			▶ **3b**	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	244.	
4 Dividends and interest from securities			14	948,951.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	3,944,711.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		4,893,906.	0.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 4,893,906.

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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		

Sign Here

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

BANK OF HAWAII, Trustee

By [signature] Vice President | OCT 19 2011

Signature of officer or trustee | Date | Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ▶			Firm's EIN ▶	
Firm's address ▶			Phone no.	

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03-04-11

16100427 791519 115024150 2010.03040 VICTORIA S & BRADLEY L GEIS 11502401

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

SOURCE	AMOUNT
BANK OF HAWAII ACCT #115024150	244.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	244.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BANK OF HAWAII ACCT #115024150	1,032,806.	83,855.	948,951.
TOTAL TO FM 990-PF, PART I, LN 4	1,032,806.	83,855.	948,951.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEE	2,500.	750.		1,750.
TO FORM 990-PF, PG 1, LN 16B	2,500.	750.		1,750.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GRANTS ADMINISTRATION FEE	164,500.	0.		164,250.
2010 SCHOLARSHIP CHECK PROCESSING FEE	1,500.	0.		1,500.
TO FORM 990-PF, PG 1, LN 23	166,000.	0.		165,750.

FORM 990-PF	OTHER INVESTMENTS		STATEMENT 5
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT INV-1	COST	29,853,513.	38,764,077.
TOTAL TO FORM 990-PF, PART II, LINE 13		29,853,513.	38,764,077.

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION **99-0163400**
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2010

Description	Units	Book Value	Market Value
AT&T INC	2,770.000	79,194.30	81,383
ABERDEEN SMALL CAP FUND CL INST	197.483	1,875.31	3,114
ABERDEEN ASIA-PACIFIC EX-JAPAN EQUITY FUND INSTITUTIONAL CLASS	36,562.852	506,769.43	452,282
ABERDEEN INTL EQUITY INSTITUTIONAL FUND CL SHS	180,960.370	2,249,968.32	2,357,914
ALTERA CORPORATION	2,330.000	87,022.01	82,901
AMERICAN EXPRESS CO	2,840.000	127,845.44	121,893
AMERICAN EXPRESS CO SR UNSECURED 4 875% 07/15/2013	170,000.000	179,397.60	181,730
APACHE FINANCE CANADA COMPANY GUARNT 7.75% 12/15/2029	125,000.000	145,362.50	160,616
APPLE INC	1,030.000	328,094.35	332,237
AUTOMATIC DATA PROCESSING INC	3,000.000	35,500.47	138,840
AUTOZONE INC	300.000	78,860.85	81,777
BAXTER INTL INC	1,590.000	79,177.55	80,486
BECTON DICKINSON & CO	980.000	66,733.30	82,830
BERKSHIRE HATHAWAY INC SR UNSECURED 3.2% 02/11/2015	200,000.000	210,630.00	206,376
BHP BILLITON LTD SP ADR	950.000	83,130.51	88,274
BOEING CO	3,830.000	66,871.80	249,946
CARNIVAL CORP	4,080.000	92,004.00	188,129
CISCO SYSTEMS	20,030.000	111,277.77	405,207
CISCO SYSTEMS NOTES 5.5% 02/22/2016	75,000.000	74,657.25	85,583
CITIGROUP INC SUB NOTES 5.5% 02/15/2017	200,000.000	200,434.00	207,008
COGNIZANT TECH SOLUTIONS CORP	1,170.000	81,278.85	85,749
COLUMBIA ACORN INTERNATIONAL FUND CL Z	20,248.260	815,802.40	828,559
COMCAST CORP COMPANY GUARNT 6.5% 01/15/2017	115,000.000	127,627.00	132,569
CONOCOPHILLIPS	9,190.000	79,045.00	625,839
DOMINION RESOURCES INC SR NOTES SER F PUTABLE 8/15 5.25% 08/01/2033	200,000.000	192,355.50	220,156
DUKE CAPITAL CORP SENIOR NOTES 8% 10/01/2019	100,000.000	115,885.00	121,826
EMC CORP	3,750.000	82,816.88	85,875
EXPRESS SCRIPTS	3,980.000	215,407.15	215,119
EXXON MOBIL CORP	6,720.000	81,231.90	491,366
FEDERAL NATIONAL MTGE ASSN NOTES 5.5% 05/10/2027-2017	50,000.000	49,750.00	53,665
FEDERAL NATIONAL MTGE ASSN NOTES 2 875% 12/11/2013	170,000.000	173,148.40	178,707
FREEPORT MCMORAN COPPER & GOLD CLASS B	2,440.000	262,734.56	293,020
FRONTIER COMMUNICATIONS CORP	2,928.000	17,936.20	28,489
GENERAL ELECTRIC CO	15,000.000	100,234.37	274,350
GENERAL ELECTRIC CO NOTES 5% 02/01/2013	200,000.000	200,135.25	213,794
GENERAL ELEC CAP CORP FDIC GUARANTEED 3% 12/09/2011	100,000.000	101,027.00	102,404
GILEAD SCIENCES INC	3,150.000	118,324.08	114,156
GOLDMAN SACHS GROUP INC	1,580.000	257,226.69	265,693
GOLDMAN SACHS GROUP INC SUB NOTES 5.625% 01/15/2017	150,000.000	149,295.00	158,616
GOOGLE INC CL A	390.000	156,034.06	231,648
GRAINGER W W INC	2,980.000	86,457.25	411,568
HARBOR INTERNATIONAL GROWTH FUND	66,074.815	478,473.25	817,345
HARLEY-DAVIDSON	5,990.000	26,794.01	207,673
HARRIS CORP SR UNSECURED 5% 10/01/2015	60,000.000	56,336.10	63,437

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION **99-0163400**
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2010

Description	Units	Book Value	Market Value
HARRIS CORP SR UNSECURED 5.95% 12/01/2017	100,000.000	99,652.00	111,504
HONEYWELL INTERNATIONAL INC	3,550.000	112,281.17	188,718
HONOLULU HAWAII CITY & CNTY BUILD AMERICA BONDS 6.3% 09/01/2034-2019	100,000.000	100,000.00	100,220
HONOLULU HI CITY & CNTY WASTEWTR SYS REV BUILD AMERICA BONDS 4 643% 07/01/2022-2020	75,000.000	75,000.00	71,533
HORMEL FOODS CORP	9,030.000	105,052.02	462,878
HOUSEHOLD FINANCE CORP NOTES 6.375% 10/15/2011	65,000.000	60,043.75	67,763
HUMANA INC	1,370.000	78,592.65	74,994
HUNT JB TRANSPRT SVCS INC	2,940.000	113,986.74	119,981
ILLINOIS TOOL WORKS INC	9,000.000	72,871.87	480,600
INTEL CORP	3,780.000	72,576.00	79,493
INT'L BUSINESS MACHINES	2,680.000	240,878.40	393,317
ISHARES MSCI EMERGING MARKETS INDEX	19,000.000	538,481.35	905,198
JP MORGAN CHASE & CO	5,000.000	200,762.00	212,100
JACOBS ENGINEERING GROUP INC	1,990.000	81,123.15	91,242
JANUS TRITON FUND CL T	91,860.342	1,483,544.51	1,508,347
PERKINS MID CAP VALUE FUND CL T	26,061.057	348,175.72	588,198
JANUS FORTY FUND-I	29,434.061	650,321.28	999,875
JOHNSON & JOHNSON	10,000.000	124,023.50	618,500
JOHNSON & JOHNSON SR NOTES 5.15% 07/15/2018	125,000.000	124,433.75	142,253
JOHNSON CONTROLS	3,450.000	64,740.63	131,790
JOY GLOBAL INC	1,200.000	29,286.48	104,100
KEYCORP NEW	11,460.000	92,711.40	101,421
KINDER MORGAN ENERGY PARTNERS LP NOTES 7.125% 03/15/2012	75,000.000	77,035.50	80,009
KOHL'S CORP	2,540.000	44,354.75	138,024
ESTEE LAUDER COMPANIES INC NOTES 6% 01/15/2012	150,000.000	149,307.00	157,392
LAZARD EMERGING MARKETS PORTFOLIO	116,625.442	2,156,250.47	2,540,102
LINEAR TECHNOLOGY CORP	2,880.000	97,458.91	99,619
NATIXIS LOOMIS SAYLES VALUE-Y	47,741.388	557,157.90	888,467
NATIXIS LOOMIS SAYLES LTD GOV AND AGCY FD CL Y	42,373.277	509,261.62	504,666
MAINSTAY HIGH YIELD CORP BOND FUND CL I	193,017.139	1,133,010.61	1,136,871
MANAGERS AMG TIMESSQUARE MID CAP GROWTH FD-IN	40,691.760	395,930.82	571,312
MASTERCARD INC CLASS A	320.000	52,825.73	71,715
MATTEL INC SR UNSECURED 5.625% 03/15/2013	75,000.000	81,268.50	80,633
MAUI CNTY HAWAII TAXABLE-SER A-RECOVERY ZONE ECONOMIC DEV BDS 4.559% 06/01/2022-2020	50,000.000	50,000.00	47,589
MCDONALDS CORP	990.000	78,467.20	75,992
MERCANTILE BANKSHARES CORP SUB NOTES SER B 4.625% 04/15/2013	180,000.000	189,874.80	189,166
MERCANTILE SAFE DEP & TR NOTES 5.7% 11/15/2011	200,000.000	199,620.00	208,048
MERCK & CO INC	2,690.000	62,486.17	96,948
MERRILL LYNCH & CO SR UNSECURED SER MTN FLT QTRLY .53344% 06/05/2012	135,000.000	135,000.00	133,734
MICROSOFT CORP	18,720.000	49,432.50	522,475
MORGAN STANLEY SR UNSECURED 5.75% 10/18/2016	125,000.000	124,756.25	133,310

Description	Units	Book Value	Market Value
MURPHY OIL CORP	3,090.000	50,933.47	230,360
NATIONAL RURAL UTILITIES COLLATERAL TRUST 10.375% 11/01/2018	75,000.000	74,427.75	103,457
NEW VALLEY GENERATION IV TVA PASS THRU CERTS 4.687% 01/15/2022 OFV 100000	78,338.870	72,055.31	85,667
NIKE INC CL B	900.000	78,982.56	76,878
PARTNERRE FINANCE COMPANY GUARNT 6.875% 06/01/2018	150,000.000	148,665.00	164,277
PEABODY ENERGY CORP	2,280.000	143,145.24	145,874
PEPSICO INC	7,000.000	383,600.00	457,310
PERRIGO CO.	1,390.000	87,171.49	88,029
PFIZER INC	15,000.000	62,414.82	262,650
PHARMACIA CORPORATION DEBENTURES 6.75% 12/15/2027	100,000.000	119,424.00	116,692
PITNEY BOWES INC NOTES SER MTN 5.25% 01/15/2037	100,000.000	94,678.00	101,329
PRES&FELLOWS OF HARVARD BONDS 6.3% 10/01/2037-2016	170,000.000	177,002.00	183,894
T ROWE PRICE GROUP INC	6,910.000	95,444.37	445,971
PROCTER & GAMBLE CO	1,470.000	83,290.20	94,565
PUBLIC SERVICE ENT GROUP INC	2,490.000	78,335.15	79,207
QUALCOMM INC	2,020.000	106,153.83	99,970
RESOLUTION FUNDING CORP BONDS 8.875% 07/15/2020	165,000.000	243,521.85	230,383
RYDER SYSTEM INC NOTES SER MTN 5.85% 03/01/2014	125,000.000	125,507.50	133,700
SPDR S&P 500 ETF TRUST	5,570.000	457,631.20	700,428
SCHWAB CHARLES CORP SR NOTES SER A 6.375% 09/01/2017	60,000.000	59,831.40	67,709
SCIENCE APPLICATIONS INTL CORP SR UNSECURED 5 5% 07/01/2033	140,000.000	128,385.20	134,760
CONSUMER DISCRETIONARY SELECT SECTOR SPDR	2,330.000	66,218.60	87,165
SECURITY EQUITY FUND MID CAP VALUE FUND CL I	129,350.062	1,578,070.75	1,541,853
SIGMA - ALDRICH CORP	6,490.000	102,101.65	431,974
SMALL BUSINESS ADMIN BONDS US GOVT GUARANTEE 6.344% 08/10/2011 OFV 200000	3,353.680	3,353.68	3,452
SMITH INTERNATIONAL INC SENIOR NOTES 6% 06/15/2016	125,000.000	125,263.25	145,550
SOUTHERN CO	2,500.000	85,775.00	95,575
STERICYCLE INC	1,040.000	80,247.96	84,157
TARGET CORP	2,660.000	97,528.90	159,946
TEMPLETON GLOBAL BOND FD GLOBAL BOND FD-AD	114,169.679	1,546,999.14	1,548,141
US BANCORP	9,620.000	237,902.60	259,451
US BANK NA NOTES 6.3% 02/04/2014	100,000.000	105,093.40	111,563
HOUSING URBAN DEVELOPMENT US GOVT GUARANT 3.44% 08/01/2011	125,000.000	125,000.00	127,224
US TREASURY BONDS 4.5% 08/15/2039	410,000.000	431,465.24	421,021
US TREASURY NOTES 4.75% 05/15/2014	340,000.000	338,859.19	379,763
US TREASURY NOTES 4.25% 11/15/2014	100,000.000	106,304.69	110,555
US TREASURY NOTES 4.25% 08/15/2015	350,000.000	379,257.81	387,545
US TREASURY NOTES N/B 2.75% 10/31/2013	185,000.000	196,042.19	194,466
US TREASURY NOTES 1.5% 07/15/2012	60,000.000	59,892.19	60,996
US TREASURY NOTES 2.625% 12/31/2014	315,000.000	314,827.70	328,460
UNITEDHEALTH GROUP INC	2,080.000	78,873.60	75,109
VARIAN MEDICAL SYSTEMS INC	2,020.000	138,557.86	139,946
VERIZON COMMUNICATIONS	6,170.000	137,874.80	220,763

Description	Units	Book Value	Market Value
VISA INC CL A SHARES	2,480.000	189,081.15	174,542
WAL-MART STORES INC SR UNSECURED 6.5% 08/15/2037	75,000.000	75,741.00	88,114
WAL-MART STORES INC SENIOR NOTES 3.25% 10/25/2020	200,000.000	199,619.00	187,970
WELLS FARGO COMPANY	2,730.000	78,670.96	84,603
WELLS FARGO COMPANY SR UNSECURED 5.625% 12/11/2017	100,000.000	99,584.00	110,718
WISCONSIN ENERGY CORP	2,720.000	162,506.13	160,099
TOTAL		**29,853,512.54**	**38,764,077**

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION
FORM 990-PF, PART XV, LINE 3
FOR YEAR ENDED 12/31/2010

Organization	Address	Project Description	Check Date	Amount
Child and Family Service	91-1841 Fort Weaver Rd. Ewa, HI 96706-1909	Supporting Foster Children and their Caregivers	5/21/2010	20,000.00
Children's Alliance of Hawaii, Inc.	1100 Alakea Street, Suite 400 Honolulu, HI 96813	Enhancements - Kauai	12/6/2010	11,500.00
Effective Planning Innovative Communication, Inc.	1130 N. Nimitz Highway, C-210 Honolulu, HI 96817	Hawaii Youth Opportunities Initiative (3 years)	12/20/2010	250,000.00
Family Programs Hawai'i	680 Ala Moana Blvd., Suite 200 Honolulu, HI 96813	Higher Education Support Program (over 3 years)	2/5/2010	77,216.00
Family Programs Hawai'i	680 Ala Moana Blvd., Suite 200 Honolulu, HI 96813	Ma Ka Hana Ka 'Ike Program	10/5/2010	25,272.00
Family Programs Hawai'i	680 Ala Moana Blvd., Suite 200 Honolulu, HI 96813	Transition of It Takes An Ohana to Family Programs Hawaii (over 2 years)	7/28/2010	38,630.00
Family Programs Hawai'i	680 Ala Moana Blvd., Suite 200 Honolulu, HI 96813	Research on Adoptions in Hawaii	7/28/2010	10,000.00
Family Programs Hawai'i	680 Ala Moana Blvd., Suite 200 Honolulu, HI 96813	Enhancements	10/5/2010	15,000.00
Family Programs Hawai'i	680 Ala Moana Blvd., Suite 200 Honolulu, HI 96813	Enhancements	12/6/2010	50,000.00
Friends of the Children's Justice Center of East Hawaii Inc.	1290 Kinoole St. Hilo, HI 96720	Enhancements	12/6/2010	45,000.00
Friends of the Children's Justice Center of Maui, Inc.	1773-A Wili Pa Loop Wailuku, HI 96793	Enhancements	12/6/2010	42,000.00
Friends of the Children's Justice Center of West Hawaii	77-6403 Nalani St. Kailua-Kona, HI 96740	Enhancements	12/6/2010	27,000.00
Hale Kipa, Inc.	615 Piikoi St., Suite #203 Honolulu, HI 96814-3139	Family Unification Program Housing Vouchers for Youth Transitioning from Foster Care (over 3 years)	12/7/2010	90,000.00
Hawaii Nature Center	2131 Makiki Heights Drive Honolulu, HI 96822	Supporting Foster Children and Families Through Nature Adventure Programs: Nature Adventures for Foster Families	12/6/2010	25,867.00
Honolulu Academy of Arts	900 South Beretania Street Honolulu, HI 96814	Website Redesign Project	5/13/2010	72,800.00
Hope In the Name of Christ, Inc.	87-669 Manuaihue St. Waianae, HI 96792	Family Camps and Support Groups	4/6/2010	29,500.00
Kapiolani Health Foundation	55 Merchant St., 26th Flr. Honolulu, HI 96813	Youth Empowerment Forum - 18th ISPCAN Congress	7/28/2010	5,000.00
Mental Health America of Hawai'i	1124 Fort Street Mall, #205 Honolulu, HI 96813	Suicide & Bullying Prevention for Foster Youth & Families	12/6/2010	24,054.00
Outreach for Grieving Youth Alliance	P.O. Box 11260 Honolulu, HI 96828	Hawaii Foster Youth Coalition (HFYC)	7/28/2010	51,500.00
The Salvation Army - Family Intervention Services	P O Box 5085 Hilo, HI 96720	The Foster Care Alumni Support Program for Transitioning Foster Youth (over 3 years)	10/8/2010	100,000.00

University of Hawaii - Office of Research Services	2530 Dole St., Sakamaki D200 Honolulu, HI 96822	Analysis of MYCN regulation by chromosome conformation capture - CRCH	6/21/2010	50,000.00
University of Hawaii - Office of Research Services	2530 Dole St., Sakamaki D-200 Honolulu, HI 96822	Individual and interactive roles of Mercury, Selenium, and omega-3 fatty acids on infant/child neurodevelopment - JABSOM	6/17/2010	50,000.00
University of Hawaii - Office of Research Services	2530 Dole St., Sakamaki D200 Honolulu, HI 96822	Developing a new model system to provide novel insights into fundamental mechanisms underlying human development and disease - PBRC	6/17/2010	50,000.00
University of Hawaii - Office of Research Services	2530 Dole St., Sakamaki D-200 Honolulu, HI 96822	Ras/ERK MAP Kinase Inhibitors from Marine Sources - Dept. of Chemistry	6/17/2010	49,982.00
University of Hawaii - Office of Research Services	2530 Dole St., Sakamaki D-200 Honolulu, HI 96822	Synthesis and Biological Evaluation of the Anti-Renal Cancer Compound Englerin A - Dept. of Chemistry	6/17/2010	49,933.00
University of Hawaii - Office of Research Services	2530 Dole St., Sakamaki D200 Honolulu, HI 96822	Inflammatory Cytokines in Box Jellyfish Envenomation - PBRC	6/17/2010	50,000.00
Waianae, District Comprehensive Health & Hospital Board, Inc.	86-260 Farrington Hwy Waianae, HI 96792	The Holomua Program	12/6/2010	30,000.00
				1,340,254 00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Arizona State University Financial Aid Office P.O. Box 870412 Tempe, AZ 85287-0412		
Kahala-Minczer, Jo-Lynn	Scholarship	$4,000.00
	Subtotal	$4,000.00
California St Univ-Dominguez Hills Financial Aid Office 1000 E Victoria St Carson, CA 90747-0005		
Maldonado, Celestine M.	Scholarship	$4,500.00
	Subtotal.	$4,500.00
Chabot College Financial Aid Office 25555 Hesperian Blvd Hayward, CA 94545		
Tuvale, Edward	Scholarship	$4,000.00
	Subtotal:	$4,000.00
Chaminade Univ of Honolulu Financial Aid Office 3140 Waialae Ave, Freitas Hall Room 11 Honolulu, HI 96816		
Brown, Crystal	Scholarship	$3,500.00
Chanhpheng, Jenny	Scholarship	$4,000.00
Ramirez, Melanie Cristie	Scholarship	$3,500.00
	Subtotal	$11,000.00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Creighton University Financial Aid Office 2500 California Plaza Omaha, NE 68178		
Yi, Grace	Scholarship	$4,000.00
	Subtotal	$4.000.00
Hawaii Community College Financial Aid Office 200 W. Kawili St. Hilo, HI 96720-4091		
Abiley, Prestonlee	Scholarship	$2,000.00
Alfaro, Sophia	Scholarship	$1,000.00
Baker, Julia	Scholarship	$2.000.00
Baker-Anderson, Tyler	Scholarship	$500 00
Berinobis, Kychelle	Scholarship	$2,000.00
Castro, Gary	Scholarship	$2,000.00
Castro, Kenoa	Scholarship	$2,000.00
Hilario, Napuanani	Scholarship	$2.000.00
Jackson, Kacy	Scholarship	$1,000.00
Mariani, Tiara	Scholarship	$1,000.00
Mariani, Savannah	Scholarship	$1,250.00
Miguel, Taiisha-Chentelle	Scholarship	$1,000.00
Miguel, Alika	Scholarship	$2,000.00
Pearcy, Tiar	Scholarship	$2,000.00
Perreira, Jade	Scholarship	$2,000.00
Perreira, Jasmine	Scholarship	$1.000.00
Racz, Brittany	Scholarship	$1,000 00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Rita. Mark	Scholarship	$2,000.00
Sullivan, Alika	Scholarship	$1,000.00
Sumaoang. Gina	Scholarship	$1,000.00
Tautua, Chantell	Scholarship	$2,500.00
Tripp, Jasmine	Scholarship	$2,000.00
	Subtotal	$34,250.00
Hawaii Pacific Univ - Nursing Financial Aid Office 1164 Bishop Street, #201 Honolulu, HI 96813		
Lee, Mint	Scholarship	$2,250.00
	Subtotal	$2,250 00
Heald College-Honolulu Financial Aid Office 1500 Kapiolani Boulevard Honolulu, HI 96814		
Santos, Kanani	Scholarship	$2,500.00
Wallace-Wong, Ariel	Scholarship	$1,000.00
	Subtotal	$3,500.00
Honolulu Community College Financial Aid Office 874 Dillingham Blvd Honolulu, HI 96817		
Ching-Stevens, Raychel-Amber	Scholarship	$1,000.00
Chong Wong, Crystal	Scholarship	$2,500.00
Gilliland, Adrian	Scholarship	$2,500.00
Hernandes-Aquino, Catharine	Scholarship	$2,000.00
Kodama, Stephanie	Scholarship	$2,500.00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Maioho. Taylor	Scholarship	$1.000.00
Rego. Charles	Scholarship	$1.000.00
sakurada, krystine	Scholarship	$2.000.00
Sugahara. Roslyn	Scholarship	$2.500.00
Tam Sing, Theresa	Scholarship	$1,000.00
	Subtotal	$18,000.00
Kapiolani Community College Financial Aid Office 4303 Diamond Head Road Honolulu, HI 96816		
Inaura, Ryxana	Scholarship	$2,000.00
Kim, Jenny	Scholarship	$2,000.00
Lee, Ash-Lyn	Scholarship	$2,000.00
Lum, Lily	Scholarship	$1,000.00
Manaole, Troy	Scholarship	$2,500.00
Nunn Khan, Arbab	Scholarship	$2,500.00
Tovio, Tamara	Scholarship	$500.00
Worachit, Nanglar	Scholarship	$2,000.00
	Subtotal:	$14,500.00
Kauai Community College Financial Aid Office 3-1901 Kaumualii Hwy Lihue, HI 96766-9591		
Espiritu, Courtney	Scholarship	$1.000.00
Hilario, Luke	Scholarship	$500.00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Troche, Nadia	Scholarship	$2,500.00
	Subtotal	$4,000 00
Laney College Financial Aid Office 900 Fallon Street Oakland, CA 94607		
Mueller, Melissa	Scholarship	$1,500 00
	Subtotal	$1,500.00
Leeward Community Coll-Waianae Financial Aid Office 96-045 Ala Ike Pearl City, HI 96782		
Iokua, Leinaala	Scholarship	$1,000.00
	Subtotal	$1,000.00
Leeward Community College Financial Aid Office 96-045 Ala Ike Pearl City, HI 96782		
artuyo, naalei	Scholarship	$2,000.00
Baloyot, David	Scholarship	$2,000.00
Cambra-Orpilla, Dezandria	Scholarship	$2,500.00
Davidson-Pieper, Xzayvier	Scholarship	$500.00
Dean, Conchita	Scholarship	$1,250.00
Dickens, Cheyenne	Scholarship	$1,000.00
Dumancus, Chantel	Scholarship	$500.00
Gamiao, Elizabeth-Elyse	Scholarship	$1,500.00
Ganahl-Yates, Chloe	Scholarship	$2,500.00
Gusman, Keri	Scholarship	$2,000.00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Guzman, Rosesita	Scholarship	$2,500 00
Ho-Santos, Raenell	Scholarship	$2,500.00
Ines, Bryson	Scholarship	$1,000.00
kekoolani, tiffany	Scholarship	$2.000.00
Kelinoi, Kerilyn	Scholarship	$1,000.00
Kyle-Bargas, Fantashia	Scholarship	$500 00
Lum, Kelan	Scholarship	$2.500 00
Mahuka Ridgeway, Shamyra	Scholarship	$2,000.00
Makaila, Lloyd	Scholarship	$2.000.00
Manago, Lanihoku	Scholarship	$2.000.00
Pada, Bernadette	Scholarship	$2.000.00
Rapoza, Erica	Scholarship	$2,000.00
Raymond, Elena	Scholarship	$1,000.00
Silva, Genny	Scholarship	$2,500.00
Sterling, Sarah	Scholarship	$1,000.00
Stout, Kele	Scholarship	$1,000.00
Tanaka, Britney	Scholarship	$2,500.00
Waiwaiole, Nawaimaka	Scholarship	$1,000 00
	Subtotal	$46,750.00

Maui Community College
Financial Aid Office
310 Ka'ahumanu Ave
Kahului, HI 96732

Feliciano, Chenoa	Scholarship	$1,000.00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Kaimimoku, Charles	Scholarship	$2,500.00
	Subtotal	$3,500.00
Mesa Community College Financial Aid Office 1833 W Southern Avenue Mesa, AZ 85202		
Bailey. Elizabeth	Scholarship	$3.000.00
	Subtotal	$3,000.00
Mills College Financial Aid Office 5000 MacArthur Boulevard Oakland, CA 94613		
Cabrido, Crystal	Scholarship	$4,000 00
	Subtotal·	$4,000 00
Minot State University Financial Aid Office 500 University Ave. W Minot, ND 58707		
Genovia, Brittany	Scholarship	$6,250.00
	Subtotal	$6,250.00
San Diego Mesa College Financial Aid Office 7250 Mesa College Dr San Diego, CA 92111		
Kahoohanohano, John	Scholarship	$1,500.00
	Subtotal	$1,500.00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
San Diego State University Scholarship Office 5500 Campanile Dr San Diego, CA 92182-0585		
Robinson, Elizabeth	Scholarship	$2,750.00
	Subtotal	$2,750.00
Sinclair Community College Financial Aid Office 444 W. Third St. Dayton, OH 45402-1460		
Vargas, Jenny Lyn	Scholarship	$3,000.00
	Subtotal:	$3,000.00
South University-Montgomery Financial Aid Office 5355 Vaughn Road Montgomery, AL 96116-1120		
Nash-Beaman, La'Risha	Scholarship	$750.00
	Subtotal:	$750.00
Thiel College Financial Aid Office 75 College Avenue Greenville, PA 16125		
Kahoohanohano, John	Scholarship	$4,500.00
	Subtotal.	$4,500.00
Univ of Central Missouri Student Financial Services 100 Ward Edwards Building Warrensburg, MO 64093-5178		
Holbron, Keshia-Ann	Scholarship	$4,000.00
	Subtotal	$4,000.00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Univ of Hawaii -- West Oahu Financial Aid Office 96-043 Ala Ike Street Pearl City, HI 96782		
Carlson, Amber	Scholarship	$4,000.00
Gamboa, Jacquelyn	Scholarship	$2,250.00
Nagel, Haunani	Scholarship	$4,000.00
	Subtotal	$10,250.00
Univ of Hawaii at Hilo Financial Aid Office 200 W Kawili Street Hilo, HI 96720-4091		
Aiwohi, Mailehooaihinanomekealoha	Scholarship	$4,000.00
Duyao, Myles	Scholarship	$1,250.00
Fonseca, Kevin	Scholarship	$3,500.00
Kahaleua, Bronson	Scholarship	$3,500.00
Limkin, Keola	Scholarship	$3,500.00
McCormick, Bryson	Scholarship	$3,000.00
Mehau, Jo-Lyn	Scholarship	$5,500.00
Rudolfo, Layna-Allyson	Scholarship	$4,000.00
Yorong, Keshia	Scholarship	$3,500.00
	Subtotal	$31,750.00
Univ of Hawaii at Manoa Financial Aid Office 2600 Campus Road, Room 112 Honolulu, HI 96822		
Adviento, Judy	Scholarship	$3,500.00
Baros, Ashley	Scholarship	$3,000.00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Fulks, Tania	Scholarship	$4,000.00
Kealoha, Abruaym	Scholarship	$3,000.00
Melendez-Makimoto, Victoria	Scholarship	$4,500.00
Roos, Dominic	Scholarship	$3,500.00
Santiago, Taisha-Ann	Scholarship	$3,000.00
Sonobe-Morita, Kelsy	Scholarship	$3,000.00
Straley, Jonathan	Scholarship	$3,500.00
	Subtotal	$31,000.00
Univ of Hawaii Center-West Hawaii Financial Aid Office 81-964 Haleki'i St. Kealakekua, HI 96750		
Ellis, Malia	Scholarship	$1,500.00
	Subtotal	$1,500.00
Univ of Phoenix-Online Financial Aid Office 3157 E Elwood St. Phoenix, AZ 85034-7209		
Ziegler, Amber	Scholarship	$3,000.00
	Subtotal	$3,000.00
Wayland Baptist University Office of Student Fin. Aid 1900 West 7th Street, CMB 597 Plainview, TX 79072-6998		
Miller, Brittany	Scholarship	$5,000.00
	Subtotal	$5,000.00

Grantee	Grant Purpose	Grant Amount
For the Benefit of		
Weber State University Scholarship Office 1137 University Circle Ogden, UT 84408-1137		
Stewart, Elizabeth	Scholarship	$2,750.00
	Subtotal·	$2,750.00
Windward Community College Financial Aid Office 45-720 Keaahala Road Kaneohe, HI 96744		
Carlson, Amber	Scholarship	$1,250.00
Nolan, Amy	Scholarship	$2,000.00
	Subtotal	$3,250.00
	Total Grants:	**$275,000.00**

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

1164 Bishop Street • Suite 800 • Honolulu • Hawai`i • 96813 • (808) 566-5524

Capacity Building
Request for Proposals

Background: Victoria and Bradley Geist were single children who grew up in non-traditional families. They created their successes in life through their own personal efforts. The Geists were quiet philanthropists who gave anonymously and generously. During their lives, they planned to use the wealth they had accumulated to establish the Victoria S. and Bradley L. Geist Foundation.

The Foundation wishes to support foster children, their caregivers, and transitioning foster youth. The Foundation recognizes that the strength and capacity of the nonprofit organizations and programs serving foster children, their families, and youth are key to the healthy development of foster children and transitioning youth. The Foundation offers this Request for Proposals to provide meaningful support that enables nonprofit organizations and programs to strengthen and grow their capacity to serve foster children, their caregivers and transitioning foster youth.

Funding Priorities:
The Foundation seeks to support projects that will increase the capacity of the organization, the program, or the system in the community to deliver quality services to the clientele described under Eligibility Requirements. Capacity building efforts may address

- Governance and leadership;
- Strategic relationships;
- Evaluation and impact;
- Resource Development;
- Internal operations and management;
- Program design, delivery and evaluation;
- Executive and key staff transitions; and
- Staff training.

Eligibility Requirements:

- Tax-exempt Hawaii organizations are eligible to apply. Organizations may be either 501(c)(3) or religious organizations. Units of government and public schools are not eligible under this Request for Proposals. Fiscal sponsorships are not permissible.
- The majority percentage of the organization's or program's clientele or project beneficiaries must be
  - Children in the foster custody of a Hawai`i state government agency;
  - Children placed by a Hawai`i state government agency in therapeutic foster placement or in kinship, foster, respite, guardianship, permanent custody, or adoptive families; or
  - Their caregivers, or

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- Current foster youth or young adults between the ages of 16 and 24 who have aged out of the state child welfare or mental health systems.

Grant Range, Duration and Exclusions:
Grants generally range from $5,000 to $40,000 and may be multi-year commitments, based on submission of satisfactory progress reports. Grants will not be made for capital, endowments, re-granting activities or operating costs.

Proposal Review Criteria:
The strongest proposals will be those that meet all or most of the following criteria:

Readiness to Build Capacity

- Organization demonstrates awareness of its strengths and weaknesses.
- Planning and/or self-assessment have taken place prior to beginning project.
- Project is based on a well-considered strategy.
- Project timing is relevant for the organization's stage of development.
- Board supports and is engaged in the project. If the project is program-based, upper level management supports and is engaged in the project.
- Organization demonstrates an ability to evolve, learn and be responsive to change.

Integrity of Proposed Project

- Project is focused and well defined.
- Project identifies clear outcomes and measures of success.
- Appropriate stakeholders are involved in the project.
- Project budget is adequate, relates to the project narrative, and costs are reasonable.
- If a consultant is involved in the project, that person is qualified to undertake the project

Potential for Impact of the Project

- Project will build substantial new capacity within the organization, program, or system.
- Project positions the organization or system for greater impact in fulfilling its mission.
- Project must involve an evaluation/measurement component.

Programming Excellence & Impact
Organization's programs demonstrate excellence and impact in serving the children, youth and caregivers involved in the state's child welfare or child and adolescent mental health systems.

Financial Condition
Organization's financial condition is stable, or the proposal explicitly addresses financial management

Proposal Package: The proposal (one copy) should describe the following:

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A. **Organizational Profile** *(not to exceed 1 page)*
- Describe the history of the organization, including an overview of its programs.
- Briefly describe the organization's place in the child welfare or mental health field and in this community.
- How does the organization measure its impact upon the needs of its clients or community?

B. **Project Description** *(not to exceed 4 pages)*
- Of all the things that you could do to strengthen your organization or program, why have you chosen to do this project now? (Reference both internal and external factors.)
- What have you done internally to prepare for this project? For example, discussions with the management team, involved the appropriate stakeholders, consulted with the board, etc.
- Who will provide leadership for this project, and why?
- In addition to Geist grant resources, what other resources, both financial and non-financial will you need for this project? For instance, how much staff time, what types of information, etc.
- The Foundation invests in capacity building to improve an organization's ability to accomplish its mission and benefit foster children, their caregivers and transitioning foster youth. We realize this impact may take time, and be difficult to measure. Beyond the project outcomes, how do you think this project will contribute to your organization's ability to accomplish its mission and to benefit foster children, their caregivers and transitioning foster youth? How will you measure the impact, and when do you think you will begin to see that impact?
- If you plan to use a consultant, you must select the consultant and submit their work plan and statement of qualifications along with your proposal. Proposals that include a consultant, but do not include their work plan and statement of qualifications will not be reviewed. Suggested elements of a consultant work plan: www.hawaiicommunityfoundation.org/index.php?id=77
- If the project includes hiring new staff, attach a job description and discuss how the position will be sustained beyond the grant period.

C. **Project Matrix** -- This is a key component of your proposal, and will be used in the final reporting process. Use the Project Matrix from the website under the Victoria S. and Bradley L Geist Foundation: Capacity Building.

Additional documents

- ☐ Supporting Capacity Building Proposal Cover Sheet, signed by the Executive Director and President of the Board.
- ☐ Project or program budget, detailing expenses and all sources of revenue (secured and unsecured) that will support the project or program. For multi-year requests, provide a cumulative budget and budgets for each year.
- ☐ Organization's annual operating budget for the current year
- ☐ Organization's balance sheet for the most recently completed fiscal year

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- ☐ Organization's income statement (or profit/loss statement) for the most recently completed fiscal year
- ☐ Board of Directors list
- ☐ 501(c)(3) determination letter

(Local units of national organizations must submit local unit financial information.)

Deadlines are posted at www.hawaiicommunityfoundation.org/privatefoundations.

Mail or deliver proposals to: Victoria S. and Bradley L. Geist Foundation
1164 Bishop St Ste 800
Honolulu HI 96813

For more information, e-mail foundations@hcf-hawaii.org or call (808) 566-5524 or toll-free from neighbor islands (888) 731-3863 ext. 524.

The Foundation does not accept incomplete applications or applications from organizations with overdue reports.

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VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

1164 Bishop Street • Suite 800 • Honolulu • Hawai`i • 96813 • (808) 566-5524

Supporting Foster Children and their Caregivers
Request for Proposals

Background:
Victoria and Bradley Geist were single children who grew up in non-traditional families. They created their successes in life through their own personal efforts. The Geists were quiet philanthropists who gave anonymously and generously. During their lives, they planned to use the wealth they had accumulated to establish the Victoria S. and Bradley L. Geist Foundation.

The Foundation wishes to support foster children and their caregivers. The Foundation recognizes that the appropriate resources and support for foster children and their caregivers contribute to healthier and happier lives. The Foundation offers this Request for Proposals to provide meaningful support for efforts that will result in supportive homes and experiences for Hawaii's foster children.

Funding Priorities:
Preference will be given to efforts that

- Support the recruitment, training and retention of quality foster parents;
- Support the continued relationships of foster children to their siblings;
- Address the unique needs of foster children or of their caregivers; or
- Empower foster children to participate in the decisions affecting their lives.

Eligibility Requirements:

- Tax-exempt Hawaii organizations are eligible to apply. This includes nonprofit organizations, 501(c)(3) organizations, religious organizations that are exempt from taxation, and units of government.
- More than 50 percent of the individuals served by the program must be:
  - Children in the foster custody of a Hawai`i state government agency;
  - Children placed by a Hawai`i state government agency in therapeutic foster placement or in kinship, foster, respite, guardianship, permanent custody, or adoptive families; or
  - Their caregivers.

Grant Range, Duration, and Exclusions:

- Grants usually range from $10,000 to $100,000 per year.
- Requests are considered in relationship to the size of the organization's operating budget.
- Unless the organization's clientele are solely legally recognized foster children and their caregivers, administrative fees are capped at 5% per grant award. The Foundation reserves the right to determine those costs that are administrative and subject to the limited percentage.

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- Commitments for up to three years will be considered, contingent on the submission of satisfactory progress reports.
- Capital requests and endowments will not be funded.

Proposal Review Criteria:
The strongest proposals will be those that meet all or most of the following criteria:

Integrity of the Proposed Program
- Program is well-defined and likely to be implemented successfully,
- Organization demonstrates the ability to deliver the program,
- Program budget is adequate and program costs are reasonable and consistent with the narrative,

Potential for Impact of the Program
- Program has the means to measure benefits to the participants or the community,
- Program evaluation and ongoing improvement are clearly incorporated into program design,
- Program demonstrates the ability to leverage other resources (such as funds, in-kind or community partnerships).

Proposal Package: Include one set of the following information in the proposal:

A. **Proposal narrative** (6 pages maximum, double-spaced). Include the following information:
   1) Describe your organization.
      - What are the organization's mission and history, geographic reach, and volunteer and/or paid staff size?
      - What is the organization's experience in this field?
      - What are the staff capabilities to conduct the proposed work?
   2) Describe your targeted issue and program.
      - What is the problem or opportunity to be addressed?
      - Who will benefit? Include estimated numbers.
   3) Describe the activities required to implement this program.
      - What key activities will occur?
      - What is the projected timeline?
      - Why is this program design expected to be effective? Describe any research and best practices that influenced this program design and any modifications that have been made.
      - If this is a multi-year request and you expect the activities to be different in years 1, 2, and 3, describe your expectations for how the program will develop.
      - If a consultant will be used, submit the work plan and deliverables. Additional information may be requested.

3) Describe the anticipated benefits to participants and/or the community.
   - How many unduplicated people will participate and for how long?
   - What changes do you expect among the program participants or the community?
   - How will you track participation and changes? How will you obtain feedback, make improvements and determine effectiveness?
4) Describe your funding plan.
   - Explain the project budget, including adjustments to be made if not all anticipated funding is received.
   - For what duration of time will funding be requested from the Foundation?
   - What are other prospective sources of funding once Foundation funding ceases?

B. Additional documents

- ☐ Supporting Foster Children and their Caregivers Proposal Cover Sheet, signed by the Executive Director and President of the Board.
- ☐ Project or program budget, detailing expenses and all sources of revenue (secured and unsecured) that will support the project or program. For multi-year requests, provide a cumulative budget and budgets for each year.
- ☐ Organization's annual operating budget for the current year
- ☐ Organization's balance sheet for the most recently completed fiscal year
- ☐ Organization's income statement (or profit/loss statement) for the most recently completed fiscal year
- ☐ Board of Directors list
- ☐ 501(c)(3) determination letter
- ☐ Fiscal sponsorship documents, if appropriate

(Local units of national organizations must submit local unit financial information.)

Deadlines are posted at www.hawaiicommunityfoundation.org/privatefoundations.

Mail or deliver proposals to: Victoria S. and Bradley L. Geist Foundation
1164 Bishop St Ste 800
Honolulu HI 96813

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VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

1164 Bishop Street • Suite 800 • Honolulu • Hawai`i • 96813 • (808) 566-5524

Enhancements for Foster Children 2011
Request for Proposals

Due September 15, 2010

Background
Victoria and Bradley Geist were single children who grew up in non-traditional families. They created their successes in life through their own personal efforts. The Geists were quiet philanthropists who gave anonymously and generously. During their lives, they planned to use the wealth they had accumulated to establish the Victoria S. and Bradley L. Geist Foundation.

The purpose of the Foundation's Enhancements for Foster Children program is to enhance the lives of foster children by providing items and services that allow them to enjoy a quality of life similar to that of their peers. The funds are offered in the belief that every child is special and that their growth should be nurtured and celebrated.

Eligibility Requirements
Tax-exempt Hawaii organizations are eligible to apply. This includes nonprofit organizations, 501(c)(3) organizations, religious organizations that are exempt from taxation, and units of government.

Grant Range and Duration Grants range from $5,000 to $50,000.

- Grantees may propose an administrative fee for administering these funds.
- The grant period is from January 1 through December 31, 2011.

Grant Requirements
The Foundation seeks to make grants to organizations to purchase enhancement items and services for the benefit of eligible children.

"Eligible child" means a person who:

- Is under 18 years of age, or is under 21 years of age and remains in the foster care system because he or she is attending high school; and
- Resides in Hawaii; and
- Is in one of the following categories:
  - ° Is in the foster custody of a Hawai`i state government agency; or
  - ° Is placed by a Hawai`i state government agency in therapeutic foster placement or in kinship, foster, respite, guardianship, permanent custody, or adoptive families.

"Enhancement items and services" means:

(1) Extracurricular activities (e.g., graduation or prom attire, field trips, athletic uniforms);
(2) Hobbies, sports, and cultural activities (e.g., hula lessons, soccer registration);
(3) Intersession activities (e.g., summer camp);

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(4) Facilitation of transition into adulthood (e.g., driver's education, copy of birth certificate);
(5) Quality of life enhancements (e.g., modest birthday and holiday presents, books, toys).

The following restrictions apply:

(1) Each expenditure must respond to a specific request made by an eligible child's foster caregiver, social worker, therapist, school counselor, guardian ad litem, or similar professional service provider for a specific item or service that will enhance the child's quality of life.
(2) Payments must be made to vendors for the benefit of eligible children. Payments must not be made directly to children or their foster caregivers. Grantees may provide vendor gift cards to children or foster caregivers only in cases where a vendor declines to accept a grantee's check.
(3) Enhancements funds are not intended for basic living expenses such as housing, groceries, medical and dental care, and ordinary tuition expenses.
(4) Grantees may expend no more than $500 per eligible child during the grant period.
(5) Grantees must return all unexpended funds at the end of the grant period.
(6) Grantees must submit a final report by January 31, 2012. The Foundation may require interim reports. The Foundation does not accept proposals from organizations with overdue reports.

Application requirements

Submit one original of each item listed below. No copies are required.

(1) Proposal cover sheet (available at www.hawaiicommunityfoundation.org/privatefoundations).

(2) Proposal (Maximum 5 single-spaced pages. Minimum 12-point font.) Please use these headings:

- Organization: Describe your organization's mission and programs. Describe the geographic area and the number and age range of the eligible children you propose to serve.
- Enhancements: Describe the enhancement items and services you propose to fund. Describe any programs your organization currently offers that will be complemented by the Enhancements program.
- Outreach: Describe how your organization will market the availability of the Enhancements program to the community you propose to serve. Provide an estimate of the percentage of children served who will be clients of your organization and those who will be referrals from outside of your organization's client base.
- Staff: Describe the qualifications of the staff or volunteers who will oversee and coordinate the Enhancements program.
- Evaluation: Describe how your organization will evaluate the impact of the Enhancements program.

(3) Enhancements program budget, showing:

- Income, including source, amount, restrictions, and whether secured or unsecured; and
- Expenses, including proposed administration fee, if any.

(4) If applicable, interim expense report for Geist Foundation Enhancements for Foster Children 2010. Provide the unduplicated number of children served and the total amount expended in each category:
  (1) Extracurricular activities (e.g., graduation or prom attire, field trips, athletic uniforms);
  (2) Hobbies, sports, and cultural activities (e.g., hula lessons, soccer registration);
  (3) Intersession activities (e.g., summer camp);
  (4) Facilitation of transition into adulthood (e.g., driver's education, copy of birth certificate);
  (5) Quality of life enhancements (e.g., modest birthday and holiday presents, books, toys);
  (6) Administration fee.

Also provide the total, unduplicated number of children served and the total number of children served who are not clients of the agency.

(5) Organization's operating budget for the current year.

(6) Organization's balance sheet for the most recently completed fiscal year.

(7) Organization's income statement (or profit/loss statement) for the most recently completed fiscal year.

(8) List of governing board members, including their professional or community affiliation.

(9) IRS 501(c)(3) determination letter.

The proposal is due September 15, 2010.

Mail or deliver proposals to: Victoria S. and Bradley L. Geist Foundation
1164 Bishop St Ste 800
Honolulu HI 96813

For more information, contact Amy Luersen via email at aluersen@hcf-hawaii.org or call (808) 566-5550 or toll-free from neighbor islands (888) 731-3863 ext. 550.

The Foundation does not accept incomplete applications or applications from organizations with overdue reports.

Revised March 2010

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

1164 Bishop Street • Suite 800 • Honolulu • Hawai'i • 96813 • (808) 566-5524

Supporting Transitioning Foster Youth
Request for Proposals

Background: Victoria and Bradley Geist were single children who grew up in non-traditional families. They created their successes in life through their own personal efforts. The Geists were quiet philanthropists who gave anonymously and generously. During their lives, they planned to use the wealth they had accumulated to establish the Victoria S. and Bradley L. Geist Foundation.

The Foundation recognizes that transitioning foster youth will succeed and give back to the community when they have positive and supportive peer and adult networks, opportunities to pursue employment and post-secondary education and training, and basic supports available in the community when needed. The Foundation offers this Request for Proposals to provide meaningful support for efforts to support Hawaii's transitioning foster youth.

Funding Priorities:
Preference will be given to efforts that seek youth input and engagement in initial and ongoing program development and work in one or more of the following areas:

- Effectively connect youth with opportunities and community resources for employment and post-secondary education and training.
- Support positive, lifelong adult connections.
- Support positive peer networks.
- Support youth efforts in community service and in advocacy efforts to improve the child welfare system.
- Support youth in meeting basic needs.

Eligibility Requirements:

- Tax-exempt Hawaii organizations are eligible to apply. This includes nonprofit organizations, 501(c)(3) organizations, religious organizations that are exempt from taxation, and units of government.
- Non-residential programs must preferentially and primarily (more than 50%) serve current foster youth or young adults up to the age of 24 who have aged out of the state child welfare or mental health systems.
- Funding for residential programs may only serve current foster youth or young adults up to the age of 24 who have aged out of the state child welfare or mental health systems. Youth who have been legally adopted or reunited with their birth families at the age of majority are not eligible for residential services funded under this grant program.

Grant Range, Duration, and Exclusions:

- Grants usually range from $10,000 to $100,000 per year.
- Requests are considered in relationship to the size of the organization's operating budget.

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- Unless the organization's clientele are solely legally recognized as current or former foster youth up to the age 24, administrative fees are capped at 5% per grant award. The Foundation reserves the right to determine those costs that are administrative and subject to the limited percentage.
- Commitments for up to three years will be considered, contingent on the submission of satisfactory progress reports.
- Capital requests and endowments will not be funded.

Proposal Review Criteria:
The strongest proposals will be those that meet all or most of the following criteria:

Integrity of the Proposed Program
- Program is well-defined and likely to be successfully implemented,
- Organization demonstrates the ability to deliver the program,
- Program budget is adequate and program costs are reasonable and consistent with the narrative,
- Program design includes youth input and will engage the targeted population.

Potential for Impact of the Program
- Program has the means to measure benefits to the participants or the community,
- Program evaluation and ongoing improvement are clearly incorporated into program design,
- Program demonstrates the ability to leverage other resources (such as funds, in-kind or community partnerships).

Proposal Package: Include one set of the following information in the proposal:

A. **Proposal narrative** (6 pages maximum, double-spaced). Include the following information:
   1) Describe your organization.
      - What are the organization's mission and history, geographic reach, and volunteer and/or paid staff size?
      - What is the organization's experience in this field?
      - What are the staff capabilities to conduct the proposed work?
   2) Describe your targeted issue and program.
      - What is the problem or opportunity to be addressed?
      - Who will benefit? Include estimated numbers.
   3) Describe the activities required to implement this program.
      - What key activities will occur?
      - What is the projected timeline?
      - Why is this program design expected to be effective? Describe any research and best practices that influenced this program design and any modifications that have been made.

- If this is a multi-year request and you expect the activities to be different in years 1, 2, and 3, describe your expectations for how the program will develop.
- If a consultant will be used, submit the work plan and deliverables. Additional information may be requested.

4) Describe the anticipated benefits to participants and/or the community.
   - How many unduplicated people will participate and for how long?
   - What changes do you expect among the program participants or the community?
   - How will you track participation and changes? How will you obtain feedback, make improvements and determine effectiveness?
5) Describe your funding plan.
   - Explain the project budget, including adjustments to be made if not all anticipated funding is received.
   - For what duration of time will funding be requested from the Foundation?
   - What are other prospective sources of funding once Foundation funding ceases?

B. Additional documents

- ☐ Supporting Transitioning Foster Youth Proposal Cover Sheet, signed by the Executive Director and President of the Board.
- ☐ Project or program budget, detailing expenses and all sources of revenue (secured and unsecured) that will support the project or program. For multi-year requests, provide a cumulative budget and budgets for each year.
- ☐ Organization's annual operating budget for the current year
- ☐ Organization's balance sheet for the most recently completed fiscal year
- ☐ Organization's income statement (or profit/loss statement) for the most recently completed fiscal year
- ☐ Board of Directors list
- ☐ 501(c)(3) determination letter
- ☐ Fiscal sponsorship documents, if appropriate

(Local units of national organizations must submit local unit financial information.)

Deadlines are posted at www.hawaiicommunityfoundation/privatefoundations.org

Mail or deliver proposals to: Victoria S. and Bradley L. Geist Foundation
1164 Bishop St Ste 800
Honolulu HI 96813

For more information, e-mail foundations@hcf-hawaii.org or call (808) 566-5524 or toll-free from neighbor islands (888) 731-3863 ext. 524.

The Foundation does not accept incomplete applications or applications from organizations with overdue reports.

Revised July 2008

MEDICAL RESEARCH
2010 Request for Proposals

HAWAIʻI COMMUNITY FOUNDATION

Overview

The Hawaiʻi Community Foundation's (HCF) Medical Research program supports basic and clinical research conducted in Hawaiʻi. In 2010, funds will be awarded through one grantmaking round. Award recommendations are made by the Medical Research Advisory Committee (MRAC)

The Medical Research program is supported by several funders including: the George F. Straub Trust, the Victoria S. and Bradley L. Geist Foundation, and HCF component funds

The following table lists the priority areas, funding source, and grant range.

Priority Area	Funding Source	Grant range
Basic Research (preference) – immunology, genetics, or the medicinal uses of Hawaiian plants.	Geist Foundation	up to $50,000
Clinical/basic research – general	Straub Trust	up to $50,000
Clinical/basic research – cancer, heart disease, or lung disease	HCF	up to $50,000
Clinical/basic research – prevent blindness, with particular emphasis on macular degeneration	HCF	up to $50,000
Clinical/basic research – type II diabetes (juvenile diabetes).	HCF	up to $50,000
Clinical/basic research – Alzheimer's disease, mental or physical diseases related to old age.	HCF	up to $50,000
Research infrastructure – This priority area is not a research project, per se, but is intended to improve Hawaiʻi's research organizational effectiveness. For example, support of organizational change, support new or existing research systems, or assist with inter-organizational collaborative efforts, etc.	HCF	up to $25,000

Priorities

The intent of the Medical Research program is to support research proposals that are based on strong science and use proper protocols. Priority is given to research projects that demonstrate the following:

- A foreseeable benefit to the people of Hawaiʻi.
- Will lead to other funding sources, including bringing national funding to Hawaiʻi.
- A collaborative effort in Hawaiʻi-based research.
- The Principal Investigator (PI) is a new and independent researcher in Hawaiʻi.

Award Period

- One-year grant requests – Researchers will have eighteen (18) months to complete their research project.
- Two-year grant requests – Those receiving a two-year grant award must follow the below schedule:
  - Year 1 – Researchers will have twelve (12) months to complete the Year 1 of their research and the PI must submit a progress and financial report indicating the research objectives have been met and all of the funds have been utilized. **(Failure to meet the objectives or utilize the funds allocated for Year 1 may result in the loss of Year 2 funding.)**
  - Year 2 – Upon approval of the Year 1 reports, HCF will issue the Year 2 grant award. Researchers will have eighteen (18) months to complete the final phase of their research project.

Eligibility

Organizations are eligible to apply for a grant if:

- Organization is a 501(c)(3) organization or a unit of government.
- The PI is based in and is conducting their research in Hawai'i.
- The PI is at least equivalent to an Assistant Professor.
- Only one (1) grant proposal submission per PI will be accepted. This includes being identified as a Co-PI.
- A PI with a current grant and whose report deadline has not passed may apply. However, if awarded, a new grant will not be released until the current grant is completed and all reports are received.

PROPOSAL PACKET

The proposal must be comprised of each of the items listed below. Incomplete proposals will not be reviewed. Please submit two sets (one original and one copy) of each of the following:

1. **HCF Medical Research Proposal Cover Sheet** (see attached)
   - PI's name, signature, address, telephone, fax, and email
   - Name and authorized signature of the institution fiscally responsible for the grant. (Note: All University of Hawai'i proposals must be signed by the Office of Research Services, not department heads.)

2. **Proposal Abstract** (maximum of one (1) page)
   - Short description of the technical study that also includes study title, institution, and PI's name.

3. **Lay Summary** (maximum of one (1) page)
   - Short description of the study written for the general public that also includes study title, institution, and PI's name.

4. **Proposal Narrative** (maximum of eight (8) pages, single spaced, using Times New Roman font, and a font size of not less than 12 pt.)
   - Name(s) of PI(s).
   - Description of project, including research hypotheses, objectives, methodology, preliminary data, applicability, etc.
   - Significance of project – How the research will benefit the people of Hawai'i, document a need and relate to the field of medicine, and how project findings will be disseminated.
   - **For Clinical Research, the proposal narrative must also include the following:**
     - How patients will be recruited.
     - Detail on the research procedures that will be used.
     - Detail on how the research will be analyzed.

5. **Bibliography** (maximum of two (2) pages)
   - DO NOT submit actual papers or research documentation as part of your proposal.

6. **Budget**
   - Grant funds may be used for salaries, supplies and other expenses directly related to the proposed project. Funding may support PI(s) salary. However the parent institution must confirm the availability of the PI's time. A limited amount of equipment essential to the proposed project may be funded provided sufficient justification is included.
   - Project budget – Provide details of the total cost of the project. Identify the amount requested from HCF and which expenses HCF's funds would cover, and list all the sources of funds to cover the total cost of the project including those that have been secured and are currently unsecured. The project budget may include travel expenses provided justification is sound and reasonable.

- Budget Justification – Provide justification for all of the expenses attributed to the research that HCF is being requested to support. For salaries, please provide the formula for deriving at the budgeted amount (i.e. hourly rate x # of hrs. dedicated to the project).
- Indirect Costs – For grants to the University of Hawai'i that are awarded through the Office of Research Services, a flat rate of 5% of total direct costs will be allowed. For other institutions, indirect costs are allowed on a direct personnel costs basis only and are calculated as follows:
  - 40% of the project's direct personnel costs for studies with a total project budget below $10,000
  - 30% of the project's direct personnel costs for studies with a total project budget of $10,001 – $20,000
  - 20% of the project's direct personnel costs for studies with a total project budget of $20,001 and over
- Other funding sources – Include a list of pending requests for this and all other research projects of the PI and co-PI(s) including name of agency, title of project, amount requested and period of support. Indicate whether the application is for an identical or similar project, where the proposed study fits with current or pending funded research, and the plan to address funding of overlapping projects.

7. **Biographical Sketch** (maximum of four (4) pages)
   - Required for all PI(s) and co-PI(s) associated with the research. Please use the NIH Bio Sketch format. This format can be found at http://grants.nih.gov/grants/funding/phs398/biosketch.pdf

Please note: The MRAC that reviews all proposals includes scientists from a variety of disciplines in both basic and clinical research. Because your proposal may not be reviewed by a researcher in your specific discipline, the writing should be tailored for a more general medical/scientific audience.

Other materials required to be submitted with the proposal

- For research involving either human or animal subjects, the PI must submit the IRB application cover page as documentation of a request for IRB approval. Please do not submit the entire application. If approved, the grant will be contingent on receiving IRB approval. No proposals shall be reviewed without the IRB cover sheet and no funds shall be released without documentation of IRB approval.
- If the organization is applying for the first time to Hawai'i Community Foundation or if there are any changes since last submitted, please submit the organization's IRS determination letter (not applicable to units of government)

Proposal Packet Format

- ☐ Use white 8 1/2" x 11" paper
- ☐ Margins are not less than 1"on all sides
- ☐ All pages, including attachments, must be single-sided and paginated
- ☐ The font is Times New Roman and text font size is not less than 12 pt.
- ☐ No binding, folders, staples
- ☐ No videos or CDs
- ☐ Appendices must have title page(s) and should be limited in length

Proposal Resubmission

A PI who previously submitted a research proposal that was denied within the last twelve (12) months, and was encouraged to resubmit a proposal, may resubmit their proposal for review provided they adhere to the items below. Resubmitting a proposal DOES NOT guarantee your research proposal will be approved.

- In the "Medical Research Cover Sheet" which follows in this RFP, you must indicate that your proposal is a resubmission and provide the HCF proposal ID# of the denied proposal.
- The proposal resubmission must adhere to the items requested in the "Proposal Packet" indicated above.
- For the "Proposal Narrative" section, #4 of the "Proposal Packet" above, please provide a cover letter that summarizes the differences between the original and resubmitted proposals.
- Applicants are strongly advised to consider the previous comments of the reviewers when resubmitting a proposal.

Final Reports
A final report consists of a financial report from the fiscal sponsor and a programmatic narrative report from the PI. The final report is required one month after the end date of the grant. A PI with an overdue final report WILL NOT have their proposal reviewed.

Submission Deadline (only one grantmaking round in 2010)
Proposal must be postmarked or delivered by:

- April 1, 2010
- Notification likely in beginning of July 2010. PIs will be notified of the decision regarding their proposal by letter.

Applications and attachments must be postmarked or hand delivered on or before the deadline date to:

Hawai'i Community Foundation
1164 Bishop Street, Suite 800
Honolulu, HI 96813
Attn: Medical Research Program

For more information, please contact Terry Savage, Philanthropic Services Program Officer at the Hawai'i Community Foundation, at 566-5508 (O'ahu), toll-free from Neighbor Islands at 1-888-731-3863 or email tsavage@hcf-hawaii.org.

HAWAI'I COMMUNITY FOUNDATION

MEDICAL RESEARCH
2010 COVER SHEET

Please complete, print, sign, and submit with your proposal.

1. Organization submitting request *(Must be a 501(c)3 tax-exempt organization or unit of government.)*
(If this is a collaborative project, please submit names of collaborating agencies on a separate sheet.)

Organization ______________________________

Address ______________________________

______________________________ Phone ______________

Website ______________________________ Fax ______________

Name of Chief Staff: ______________________________ Email: ______________

2. Principal Investigator Information

Name ______________________________

Organization: ______________________________

Address: ______________________________ Phone ______________

Email Fax

3. Request Contact Information ***(if different from Principal Investigator)***

Name ______________________________ Title ______________

Phone: ______________________________ Fax: ______________

4. Project Information

Title

Total Amount requested: $________________ Duration: ______(months)

☐ **If Resubmitted Proposal, please indicate the proposal number:**______________

Please indicate what grantmaking program you are applying to: ☑ Please check ONLY ONE (1) box

<u>MEDICAL RESEARCH</u>

(Please identify the one area below that best applies to your proposed research)

☐ Clinical – general	☐ Basic – general
☐ Clinical – cancer	☐ Basic – cancer
☐ Clinical – Heart disease	☐ Basic – heart disease
☐ Clinical – Lung disease	☐ Basic – lung disease
☐ Clinical – juvenile diabetes	☐ Basic – juvenile diabetes
☐ Clinical – Alzheimer's Disease	☐ Basic – Alzheimer's Disease
☐ Clinical – prevention of blindness	☐ Basic – prevention of blindness
☐ Clinical – immunology, genetic research, or the medicinal use of Hawaiian plants	☐ Basic – immunology, genetic research, or the medicinal use of Hawaiian plants
	☐ Research infrastructure

Two Signatures Required

We understand the grant we are applying for is contingent on our organization remaining one which is described in Section 501 (c)(3) of the Internal Revenue Code and that the award of a grant by the Hawai'i Community Foundation is explicitly contingent on our acceptance of the grant terms and conditions set forth in the award letter. Our organization accepts and agrees to follow such conditions if it is awarded a grant by the Hawai'i Community Foundation.

______________________________	______________________________
Principal Investigator *(or Chief Compensated Staff)*	Research Institution Director *(or Chief Volunteer)*
______________________________	______________________________
Print or Type Name and Title	Print or Type Name and Title

FOR HCF USE ONLY

PROPOSAL ID#: __________ OVER DUE REPORT? __________ GRANT HISTORY REPORT: __________

___COVER SHEET W/SIGNATURE	___BUDGET
___PROPOSAL ABSTRACT	___BIBLIOGRPHY
___LAY SUMMARY	___BIOGRAPHICAL SKETCH
___PROPOSAL NARRATIVE	___RECEIPT OF PROPOSAL NOTIFICATION

THE VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

Since 1995 more than $2.5 million has been awarded in college scholarships to students currently or formerly in the foster care system. As a result of financial assistance from the Geist Foundation, hundreds of students are able to attend vocational schools, community colleges, and public and private universities both here in Hawai'i and on the mainland United States

You are eligible for a Geist Scholarship if your primary residence is in Hawaii and you plan to attend a two- or four- year college, university, or vocational school. *You must plan to enroll at least half-time* (equivalent of 6 or more credits per semester), and verification of foster care status within the State of Hawaii is required. Youth who have been legally adopted or reunited with their birth families before the age of eighteen are not eligible for support under this program.

Applicants are strongly encouraged to submit applications and materials by June 1, 2010 to be eligible for a full-year scholarship (for enrollment in the Fall and Spring semesters).

- **Applications received by June 1st** – Fall & Spring semester scholarships available
- **Applications received by October 1st** - Spring semester scholarship available.

NEW APPLICANTS

Applicants must submit the following items:

- Application Form
- Personal Statement—*Write a statement about yourself and answer the following questions:*
  - What are your reasons for attending college?
  - Why did you choose your course of study?
  - What career and college goals do you have?
- Most recent high school or college **transcript** *(not a report card)*
- Letter from case worker verifying foster care status in Hawaii.
  - This letter should document effective dates of applicant's foster care status in Hawaii.
  - The letter should state whether the applicant "aged out" of the foster care system. If not, include details of the applicant's status after leaving the foster care system – e.g applicant was reunited with a family member, applicant was adopted, etc

RENEWAL APPLICANTS

To reapply for a scholarship, you must submit the following items:

- Application Form
- Progress Report Statement—*Write a statement about yourself and include what you have learned through pursuing your educational goals.* Note: renewing students are expected to demonstrate academic progress generally by maintaining a 2.0 grade point average (GPA). If your GPA falls below 2.0, please explain in your progress report.
- Most recent **official college transcript issued by the registrar of your school** (not a report card or an unofficial transcript downloaded from the internet)

Mail all required materials to:

Hawai'i Community Foundation
Attn: Geist Foundation Scholarship
1164 Bishop Street, Suite 800
Honolulu, HI 96813

For more information, call: (808) 566-5570 or 1-888-731-3863 (toll-free) or email: scholarships@hcf-hawaii.org.

***Should your contact information or enrollment status change after you submit your application, please notify HCF immediately.*

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION SCHOLARSHIP

ACADEMIC YEAR 2010-2011

Social Security Number: _____-_____-_____ Date of Birth: ___/___/___ ☐ Male ☐ Female

Name: ____
First Middle Initial Last

Have you previously applied to or been awarded a Geist scholarship? ☐ **Yes** ☐ **No**

Permanent Hawai'i Address: ____
Street Number City State Zip Code

Phone Number: ______________ Alternate Phone Number: ______________ Island: ____________

Temporary or mailing address (if different from permanent):

____
Street Number (or P.O. Box) City State Zip Code

Email Address: ____

Name of high school: ______________________________ Year of high school graduation: ________
Name City Island

School you plan to attend: ____
Name State

Where do you plan to live: ☐ On campus ☐ Off campus ☐ Other (describe) ________________

Class year entering in school (check one): ☐ Freshman ☐ Sophomore ☐ Junior ☐ Senior ☐ Graduate

Intended major or area of study: ____________________________ # of semesters completed: ________

Will you be registered as a full-time student? ☐ Yes ☐ No If no, explain ____________________

Will you be attending for the full academic year? ☐ Yes ☐ No If no, which semesters will you be attending? ________

Referral Agency: ____

Referred by: ____
Contact Name Address City State Zip Code

________________ ________________ ________________
Phone Number Fax Number Email Address

Certification

I certify that all the information on this form is true and complete to the best of my knowledge. If asked by the Geist Foundation or the Hawai'i Community Foundation I agree to give documentation for information given on this form. I also authorize the Geist Foundation and the Hawai'i Community Foundation to release information regarding my scholarship award to my case worker, school and the media.

Applicant Signature: ______________________________ Date: ________________

(Rev. 02/10)

Form **8868**
(Rev January 2011)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

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

OMB No. 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ▶ [X]
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit *www.irs.gov/efile* and click on *e-file for Charities & Nonprofits.*

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

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

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

Type or print	Name of exempt organization	Employer identification number
File by the due date for filing your return See instructions	VICTORIA S & BRADLEY L GEIST FOUNDATION	99-0163400
	Number, street, and room or suite no. If a P.O. box, see instructions. P.O. BOX 3170, DEPT 715	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. HONOLULU, HI 96802-3170	

Enter the Return code for the return that this application is for (file a separate application for each return) [0][4]

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ BANK OF HAWAII 130 MERCHANT ST - HONOLULU, HI 96813
  Telephone No.▶ (808) 694-4525 FAX No. ▶
- If the organization does not have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______. If this is for the whole group, check this box ▶ [ ]. If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2011, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ [X] calendar year 2010 or
▶ [ ] tax year beginning ______, and ending ______.

2 If the tax year entered in line 1 is for less than 12 months, check reason: [ ] Initial return [ ] Final return
[ ] Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	$ 253,993.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	$ 24,393.
c	**Balance due.** Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 229,600.

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

LHA **For Paperwork Reduction Act Notice, see Instructions.** Form **8868** (Rev. 1-2011)

023841
01-03-11

16100427 791519 115024150 2010.03040 VICTORIA S & BRADLEY L GEIS 11502401

- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box ▶ [X]

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1).

Part II **Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print File by the extended due date for filing your return See instructions	Name of exempt organization VICTORIA S & BRADLEY L GEIST FOUNDATION	Employer identification number 99-0163400
	Number, street, and room or suite no If a P O. box, see instructions. P.O. BOX 3170, DEPT 715	
	City, town or post office, state, and ZIP code For a foreign address, see instructions. HONOLULU, HI 96802-3170	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of ▶ BANK OF HAWAII 130 MERCHANT ST - HONOLULU, HI 96813
  Telephone No. ▶ (808) 694-4525 FAX No. ▶
- If the organization does not have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box ▶ [ ] If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until NOVEMBER 15, 2011.

5 For calendar year 2010 , or other tax year beginning ______ , and ending ______

6 If the tax year entered in line 5 is for less than 12 months, check reason. [ ] Initial return [ ] Final return [ ] Change in accounting period

7 State in detail why you need the extension
ADDITIONAL TIME IS NEEDED TO GATHER ALL THE INFORMATION NECESSARY TO PREPARE A COMPLETE AND ACCURATE RETURN.

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions.	8a	$ 253,993.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	$ 253,993.
c	**Balance due.** Subtract line 8b from line 8a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions.	8c	$ 0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶ BANK OF HAWAII, Trustee By [signature] Vice President Title ▶ Date ▶ 8/15/11

023842
01-24-11