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

2010

Department of the Treasury
Internal Revenue Service

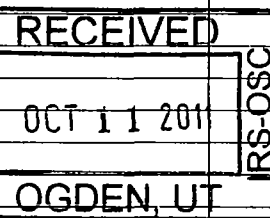
Note The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2010, or tax year beginning JUN 1, 2010, and ending MAY 31, 2011

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 JOHN STAUFFER CHARITABLE TRUST		A Employer identification number 23-7434707
Number and street (or P.O. box number if mail is not delivered to street address) 301 N. LAKE AVE., SUITE 1000	Room/suite	B Telephone number 626-793-9400
City or town, state, and ZIP code PASADENA, CA 91101-5123		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 42,117,028. (Part I, column (d) must be on cash basis)	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		103.	103.		STATEMENT 1
4 Dividends and interest from securities		1,189,180.	1,189,180.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<431,049.>			
b Gross sales price for all assets on line 6a 7,410,769.					
7 Capital gain net income (from Part IV, line 2)			0.		
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		19.	19.		STATEMENT 3
12 Total Add lines 1 through 11		758,253.	1,189,302.		
13 Compensation of officers, directors, trustees, etc		390,000.	156,000.		234,000.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 4		10,505.	7,984.		2,521.
b Accounting fees STMT 5		19,871.	17,884.		1,987.
c Other professional fees STMT 6		110,079.	110,079.		0.
17 Interest					
18 Taxes STMT 7		26,502.	26,422.		80.
19 Depreciation and depletion					
20 Occupancy		12,380.	11,761.		619.
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 8		74,127.	74,127.		0.
24 Total operating and administrative expenses Add lines 13 through 23		643,464.	404,257.		239,207.
25 Contributions, gifts, grants paid		1,160,170.			1,160,170.
26 Total expenses and disbursements. Add lines 24 and 25		1,803,634.	404,257.		1,399,377.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<1,045,381.>			
b Net investment income (if negative, enter -0-)			785,045.		
c Adjusted net income (if negative, enter -0-)				N/A	



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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			
	2 Savings and temporary cash investments	1,415,196.	1,405,351.	1,405,351.
	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 STMT 9	11,627,217.	8,834,747.	9,344,249.
	b Investments - corporate stock STMT 10	20,217,944.	19,907,190.	25,378,234.
	c Investments - corporate bonds STMT 11	3,654,937.	5,728,993.	5,938,877.
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans STMT 12	49,331.	41,098.	46,275.	
13 Investments - other STMT 13	25,878.	25,897.	1,173.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 14)	1,023.	2,869.	2,869.	
16 Total assets (to be completed by all filers)	36,991,526.	35,946,145.	42,117,028.	
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 ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	36,991,526.	35,946,145.	
	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	36,991,526.	35,946,145.	
	31 Total liabilities and net assets/fund balances	36,991,526.	35,946,145.	

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	36,991,526.
2 Enter amount from Part I, line 27a	2	<1,045,381.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	35,946,145.
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	35,946,145.

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	GAIN ON SALE OF ASSETS-SEE ATTACHED	P	VARIOUS	VARIOUS
b	LOSS ON SALE OF ASSETS-SEE ATTACHED	P	VARIOUS	VARIOUS
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 5,096,293.		4,531,940.	564,353.
b 2,314,476.		3,309,878.	<995,402.>
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			564,353.
b			<995,402.>
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	<431,049.>
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	2,015,326.	37,248,434.	.054105
2008	577,144.	37,098,222.	.015557
2007	2,615,964.	45,734,784.	.057199
2006	2,300,050.	43,698,621.	.052634
2005	2,488,083.	44,109,892.	.056406

2 Total of line 1, column (d)	2	.235901
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	.047180
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	39,184,712.
5 Multiply line 4 by line 3	5	1,848,735.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	7,850.
7 Add lines 5 and 6	7	1,856,585.
8 Enter qualifying distributions from Part XII, line 4	8	1,399,377.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	15,701.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	15,701.
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	15,701.
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a	24,474.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	24,474.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	8,773.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax <input type="checkbox"/> 8,773. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
2 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? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • 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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> CA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.GUIDESTAR.ORG</u>	13	X	
14	The books are in care of ► <u>LAGERLOF, SENEAL, ET AL</u> Telephone no. ► <u>626-793-9400</u> Located at ► <u>301 N. LAKE AVENUE, SUITE 1000, PASADENA, CA</u> ZIP+4 ► <u>91101-5123</u>			
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	
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? 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 ►	16	Yes	No
				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?		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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ 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

6b

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

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
MICHAEL R. WHALEN 4705 LAUREL CANYON BLVD., SUITE 204 VALLEY VILLAGE, CA 91607	TRUSTEE VARIABLE TO 10	130,000.	0.	0.
H. JESS SENEAL 301 N. LAKE AVENUE, SUITE 1000 PASADENA, CA 91101-5123	TRUSTEE VARIABLE TO 10	130,000.	0.	0.
JOHN F. BRADLEY 180 SOUTH LAKE AVENUE, SUITE 440 PASADENA, CA 91101	TRUSTEE VARIABLE TO 10	130,000.	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

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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
EVERETT HARRIS & CO - 26522 LA ALAMEDA, SUITE 270, MISSION VIEJO, CA 92691	INVESTMENT ADVICE	110,079.
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.

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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	38,829,135.
b	Average of monthly cash balances	1b	951,123.
c	Fair market value of all other assets	1c	1,175.
d	Total (add lines 1a, b, and c)	1d	39,781,433.
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	39,781,433.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	596,721.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	39,184,712.
6	Minimum investment return. Enter 5% of line 5	6	1,959,236.

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	1,959,236.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	15,701.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	15,701.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,943,535.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,943,535.
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	1,943,535.

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	1,399,377.
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	1,399,377.
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	1,399,377.

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.

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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				1,943,535.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005	332,229.			
b From 2006	130,316.			
c From 2007	438,849.			
d From 2008				
e From 2009	170,184.			
f Total of lines 3a through e	1,071,578.			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$ 1,399,377.				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2010 distributable amount				1,399,377.
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).)	544,158.			544,158.
6 Enter the net total of each column as indicated below:				
a Corpus: Add lines 3f, 4c, and 4e. Subtract line 5	527,420.			
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				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	527,420.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007	357,236.			
c Excess from 2008				
d Excess from 2009	170,184.			
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)

- 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.

- 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(i)(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 15

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

SEE STATEMENT 15

- c Any submission deadlines.

SEE STATEMENT 15

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

SEE STATEMENT 15

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 CALIFORNIA INSTITUTE OF TECHNOLOGY 1200 EAST CALIFORNIA BLVD. PASADENA, CA 91125	NONE	UNIVERSITY	CONSTRUCTION OF RESEARCH LABORATORY IN NEW CHEMISTRY BUILDING	250,000.
GOOD SAMARITAN HOSPITAL 1225 WILSHIRE BLVD. LOS ANGELES, CA 90017	NONE	HOSPITAL	CREATION OF A PERIPHERAL ARTERY DISEASE (PAD) CARDIOLOGY LAB	100,000.
HARVEY MUDD COLLEGE 301 PLATT BOULEVARD CLAREMONT, CA 91711	NONE	COLLEGE	SUMMER RESEARCH FELLOWSHIP IN CHEMISTRY	100,000.
HUNTINGTON MEMORIAL HOSPITAL 100 W. CALIFORNIA BLVD. PASADENA, CA 91109-7013	NONE	HOSPITAL	WEST TOWER CONSTRUCTION PROJECT	500,000.
OCCIDENTAL COLLEGE 1600 CAMPUS ROAD LOS ANGELES, CA 90041-3314	NONE	COLLEGE	CHALLENGE GRANT FOR ENDOWMENT OF RESEARCH PROGRAM IN CHEMISTRY/BIOCHEMISTRY	210,170.
Total				▶ 3a 1,160,170.
b Approved for future payment				
Total SEE STATEMENT 16				▶ 3b 1,810,170.

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.		

[illegible]

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

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

**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.

Signature of officer or trustee

Date _____

Title

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ self-employed

PTIN

**Paid
Preparer
Use Only**

DAVID BERINGER

Dan L.P.R. - CPA 9/7/11

Firm's name ► **MARTIN WERBELOW LLP**

Firm's address ► 300 N LAKE AVE, SUITE 930
PASADENA, CA 91101-4106

Firm's EIN ▶

Phone no. (626) 577-1440

Form **990-PF** (2010)

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

SOURCE	AMOUNT
INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS	103.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	103.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS AND INTEREST FROM SECURITIES	1,189,180.	0.	1,189,180.
TOTAL TO FM 990-PF, PART I, LN 4	1,189,180.	0.	1,189,180.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INVESTMENT INCOME FROM JMB IV	19.	19.	
TOTAL TO FORM 990-PF, PART I, LINE 11	19.	19.	

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LAGERLOF, SENEAL, GOSNEY & KRUSE, LLP	10,505.	7,984.		2,521.
TO FM 990-PF, PG 1, LN 16A	10,505.	7,984.		2,521.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LAGERLOF, SENEAL, GOSNEY & KRUSE, LLP	16,621.	14,959.		1,662.	
MARTIN WERBELOW LLP	3,250.	2,925.		325.	
TO FORM 990-PF, PG 1, LN 16B	19,871.	17,884.		1,987.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EVERETT HARRIS & CO.	110,079.	110,079.		0.	
TO FORM 990-PF, PG 1, LN 16C	110,079.	110,079.		0.	

FORM 990-PF	TAXES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FRANCHISE TAX BOARD	10.	5.		5.	
FOREIGN TAXES	26,342.	26,342.		0.	
CA ATTORNEY GENERAL	150.	75.		75.	
TO FORM 990-PF, PG 1, LN 18	26,502.	26,422.		80.	

FORM 990-PF	OTHER EXPENSES		STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AMORTIZATION	71,595.	71,595.		0.
ADR PASS THRU FEES	1,385.	1,385.		0.
DOCUMENT REPRODUCTION	318.	318.		0.
LIABILITY INSURANCE	760.	760.		0.
DELIVERY AND MESSENGER SERVICE	69.	69.		0.
TO FORM 990-PF, PG 1, LN 23	74,127.	74,127.		0.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	9
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
US TREASURY NOTE 4.375% DUE 08/15/12	X		181,152.	188,915.	
US TREASURY NOTE 4.0% DUE 2/15/14	X		588,028.	653,531.	
US TREASURY NOTE 5.125% DUE 5/15/16	X		249,555.	291,836.	
US TREASURY NOTE 4.25% DUE 8/15/15	X		592,510.	672,469.	
US TREASURY NOTE 4.5% DUE 2/15/16	X		222,536.	255,516.	
FED HOME LOAN BANKS 4.375% DUE 9/17/10	X		0.	0.	
US TREASURY NOTE 4.375% DUE 12/15/10	X		0.	0.	
US TREASURY NOTE 4.875% DUE 2/15/12	X		175,476.	180,824.	
US TREASURY NOTE 4.25% DUE 11/15/13	X		411,203.	452,026.	
FED HOME LOAN BANKS 5.25% DUE 9/13/13	X		201,134.	220,246.	
FED HOME LOAN MORTGAGE 5.5% DUE 9/15/11	X		200,354.	203,116.	
FEDERAL HOME LOAN BANK NOTES 3.15% DUE 04/14/11	X		0.	0.	
FEDERAL FARM CREDIT BANK NOTES 3.6% DUE 10/14/11	X		500,003.	506,424.	
FEDERAL HOME LOAN BANK NOTES 5.25% DUE 06/10/11	X		280,227.	280,362.	
FEDERAL FARM CREDIT BANK NOTES 2.6% DUE 02/19/13	X		501,175.	517,762.	

JOHN STAUFFER CHARITABLE TRUST

23-7434707

FED HOME LOAN BANK NOTES 3.1% DUE 02/24/14	X		0.	0.
FED HOME LOAN BANK NOTES 3.375% DUE 10/20/10	X		0.	0.
FED HOME LOAN BANK NOTES 2.93% DUE 03/11/14	X		502,286.	527,146.
US TREASURY NOTE 7.25% DUE 05/15/16	X		312,966.	361,638.
FEDERAL HOME LOAN BANK NOTES 4.0% DUE 11/26/13	X		0.	0.
FEDERAL HOME LOAN BANK NOTES 3.125% DUE 12/13/13	X		482,456.	507,996.
FEDERAL FARM CREDIT BANK NOTES 2.25% DUE 02/17/12	X		500,101.	507,298.
FEDERAL FARM CREDIT BANK NOTES 2.84% DUE 05/19/14	X		0.	0.
CALIFORNIA STATE GO 4.85% DUE 10/01/04		X	252,121.	266,440.
FEDERAL FARM CREDIT BANK NOTES 2.9% DUE 1/5/15	X		499,438.	526,651.
FEDERAL FARM CREDIT BANK NOTES 3.0% DUE 12/22/14	X		0.	0.
FEDERAL FARM CREDIT BANK NOTES 3.35% DUE 12/28/15	X		0.	0.
FEDERAL HOME LOAN BANK NOTES 1.5% DUE 1/16/13	X		499,260.	508,829.
FEDERAL HOME LOAN BANK NOTES 2.125% DUE 6/7/13	X		0.	0.
FEDERAL HOME LOAN BANK NOTES 3.125% DUE 7/7/14	X		500,015.	531,011.
FEDERAL FARM CREDIT BANK NOTES 1.6% DUE 11/09/15	X		300,022.	297,799.
FEDERAL FARM CREDIT BANK NOTES 2.6% DUE 3/9/16	X		250,024.	252,033.
FEDERAL HOME LOAN BANK NOTES 1.25% DUE 10/29/14	X		132,919.	133,516.
FEDERAL HOME LOAN BANK NOTES 2.0% DUE 1/27/16	X		499,786.	500,865.
TOTAL U.S. GOVERNMENT OBLIGATIONS			8,582,626.	9,077,809.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			252,121.	266,440.
TOTAL TO FORM 990-PF, PART II, LINE 10A			8,834,747.	9,344,249.

FORM 990-PF

CORPORATE STOCK

STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ABBOTT LABORATORIES	522,066.	574,750.
CISCO SYSTEMS	607,734.	420,000.
GENERAL ELECTRIC CO.	733,419.	785,600.
GOOGLE	627,719.	931,075.
JOHNSON & JOHNSON	636,336.	874,770.
PEPSICO, INC.	730,238.	924,560.
PROCTOR & GAMBLE CO.	570,828.	670,000.
ROYAL DUTCH PETROLEUM CO.	0.	0.
UNITED PARCEL SERVICE CLASS B	797,617.	808,390.
WELLS FARGO & CO.	343,745.	340,440.
MICROSOFT	649,806.	575,230.
WAL-MART STORES, INC.	947,721.	1,159,620.
ALCON INC.	0.	0.
APPLE INC.	219,531.	730,443.
BAXTER INTERNATIONAL	767,896.	892,800.
COSTCO WHOLESALE CORP	785,711.	1,237,200.
MCDONALDS CORP	858,479.	1,467,720.
1/100 BERKSHIRE HATHAWAY	773,735.	831,425.
CHEVRON CORP	685,147.	839,280.
CIA ENER DE MINAS ADR F	389,345.	562,353.
CONOCOPHILLIPS	1,009,764.	1,098,300.
DENTSPLY INT'L INC	0.	0.
MEDTRONIC INC	0.	0.
NESTLE	1,039,077.	1,604,820.
NOVO-NORDISK A-S ADR F	364,325.	882,070.
THE CHARLES SCHWABB CO.	0.	0.
UNILEVER N V NY SHS	307,886.	326,600.
VODAFONE GROUP NEW ADR F	683,918.	700,750.
WAL-MART DE MEX SAB ADRF	439,835.	788,481.
YUM BRANDS INC	497,191.	829,800.
SPDR GOLD TRUST	362,206.	598,560.
CHINA MOBILE LTD	615,897.	572,125.
ZIMMER HOLDINGS	640,642.	745,360.
COLGATE-PALMOLIVE	389,130.	437,650.
LAB CP OF AMERICA HLDG NEW	390,890.	504,150.
NOVARTIS AG	487,808.	565,712.
SYSCO CORPORATION	448,495.	483,150.
TARGET CORPORATION	244,907.	247,650.
TEMPLETON GLOBAL INCM FD	104,992.	112,900.
TEVA PHARMACEUTICAL INDS LTD	233,154.	254,500.
TOTAL TO FORM 990-PF, PART II, LINE 10B	19,907,190.	25,378,234.

FORM 990-PF	CORPORATE BONDS	STATEMENT 11
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BELLSOUTH CORP. 5.2% DUE 12/15/16	179,898.	202,975.
WELLS FARGO BANK 6.45% DUE 2/1/11	0.	0.
GOLDMAN SACHS 5.7% DUE 9/1/12	200,000.	211,994.
MORGAN STANLEY CO. 5.3% DUE 3/1/13	251,127.	266,406.
HOUSEHOLD FIN CORP. 6.375% DUE 10/15/11	200,629.	204,209.
MBNA CORP. 7.5% DUE 3/15/12	285,179.	294,486.
CLOROX 5.45% DUE 10/15/12	251,651.	264,552.
HOME DEPOT 5.2% DUE 3/1/11	0.	0.
BERKSHIRE HATHAWAY FIN NOTES 5.00% DUE 10/15/12	258,182.	271,735.
GENERAL ELECTRIC CAP. CORP. 4.8% DUE 05/01/13	247,608.	266,635.
TRICON GLOBAL 8.875% DUE 04/15/11	0.	0.
GENERAL MILLS 5.25% DUE 08/15/13	257,869.	272,232.
COMCAST CORP. NEW 6.5% DUE 01/15/15	257,841.	287,161.
MIDAMERICAN ENERGY SR. NOTE 5.875% DUE 10/1/12	519,989.	532,797.
AES CORP 8% DUE 10/15/17	270,583.	270,000.
BRINKER INT'L 5.75% DUE 6/1/14	285,712.	286,853.
CAMPBELL SOUP 3.375% DUE 8/15/14	209,112.	214,234.
COMCAST 4.95% DUE 6/15/16	268,427.	274,694.
ENTERPRISE PRODS 3.2% DUE 2/1/16	250,308.	255,424.
HOST MARRIOTT 6.375% DUE 3/15/15	255,904.	255,312.
KC STRATHERN RAIL 8.00% DUE 6/1/15	261,438.	271,875.
PITNEY BOWES 4.875% DUE 8/15/14	260,844.	269,143.
SARA LEE 2.75% DUE 9/15/15	253,629.	252,408.
VODAFONE GROUP 4.15% DUE 6/10/14	263,149.	269,066.
YUM BRANDS 3.875% DUE 11/1/20	239,914.	244,686.
TOTAL TO FORM 990-PF, PART II, LINE 10C	5,728,993.	5,938,877.

FORM 990-PF	MORTGAGE LOANS	STATEMENT 12
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
GNMA 8.00% DUE 10/15/24	622.	633.
FNMA 7.50% DUE 9/1/10	0.	0.
FNMA 7.50% DUE 10/1/24	5,102.	5,875.
GNMA II 6.00% DUE 12/20/28	27,567.	31,050.
FNMA 7.00% DUE 4/1/31	2,980.	3,432.
FNMA 6.5% DUE 6/1/16	4,827.	5,285.
TOTAL TO FORM 990-PF, PART II, LINE 12	41,098.	46,275.

FORM 990-PF		OTHER INVESTMENTS		STATEMENT 13
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
ENDOWMENT & FDTN REALTY LTD-JMB IV	FMV	25,897.	1,173.	
TOTAL TO FORM 990-PF, PART II, LINE 13		25,897.	1,173.	

FORM 990-PF	OTHER ASSETS		STATEMENT 14
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
MINERAL RIGHTS	2.	2.	2.
PREPAID INTEREST	1,021.	2,867.	2,867.
TO FORM 990-PF, PART II, LINE 15	1,023.	2,869.	2,869.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 15

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

H. JESS SENEAL
301 N. LAKE AVENUE, SUITE 1000
PASADENA, CA 91101-5123

TELEPHONE NUMBER

626-793-9400

FORM AND CONTENT OF APPLICATIONS

A LETTER STATING THE PURPOSE OF THE APPLICATION AND AMOUNT, TAX EXEMPT
STATUS FROM IRS AND STATE AUTHORITIES AND IRS PRIVATE FOUNDATION RULING.
GUIDELINES ARE AVAILABLE UPON REQUEST.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS MADE TO HOSPITALS, COLLEGES AND UNIVERSITIES IN CALIFORNIA.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
APPROVED FOR FUTURE PAYMENT

STATEMENT 16

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CALIFORNIA INSTITUTE OF TECHNOLOGY 1200 EAST CALIFORNIA BLVD. PASADENA, CA 91125	NONE CONSTRUCTION OF RESEARCH LABORATORY IN NEW CHEMISTRY BUILDING	UNIVERSITY	1000000.
GOOD SAMARITAN HOSPITAL 1225 WILSHIRE BLVD. LOS ANGELES, CA 90017	NONE CREATION OF A PERIPHERAL ARTERY DISEASE (PAD) CARDIOLOGY LAB	HOSPITAL	300,000.
HARVEY MUDD COLLEGE 301 PLATT BOULEVARD CLAREMONT, CA 91711	NONE SUMMER RESEARCH FELLOWSHIP IN CHEMISTRY	COLLEGE	300,000.
OCCIDENTAL COLLEGE 1600 CAMPUS ROAD LOS ANGELES, CA 90041-3314	NONE CHALLENGE GRANT FOR ENDOWMENT OF RESEARCH PROGRAM IN CHEMISTRY/BIOCHEMISTRY	COLLEGE	210,170.
TOTAL TO FORM 990-PF, PART XV, LINE 3B			1,810,170.

JOHN STAUFFER CHARITABLE TRUST

Gains on Sales of Assets

For the Period 06/01/10 - 05/31/11

Schedule 3

STOCKS					
<u>Date Sold</u>	<u>Date Acq'd</u>	<u>Description</u>	<u>Sales Proceeds</u>	<u>Carrying Value</u>	<u>Gain</u>
09/24/2010	n/a	settlement AIG	\$367 01	\$0 00	\$367 01
04/12/2011	07/31/2006	180 Shares Alcon Inc.	30,745 67	20,015.15	10,730 52
04/12/2011	09/28/2006	820 Shares Alcon Inc.	140,063 61	95,529 43	44,534.18
04/12/2011	02/02/2009	300 Shares Alcon Inc.	51,242.78	25,201 58	26,041.20
04/12/2011	02/02/2009	100 Shares Alcon Inc.	17,080.93	8,394.99	8,685.94
04/12/2011	02/02/2009	100 Shares Alcon Inc.	17,080 93	8,400 53	8,680.40
04/12/2011	02/02/2009	200 Shares Alcon Inc.	34,161.86	16,801 05	17,360.81
04/12/2011	02/02/2009	800 Shares Alcon Inc	136,647 42	67,204.21	69,443.21
04/12/2011	02/02/2009	100 Shares Alcon Inc.	17,080 91	8,394 98	8,685 93
04/12/2011	02/02/2009	100 Shares Alcon Inc.	17,080.93	8,400.53	8,680.40
04/12/2011	02/02/2009	200 Shares Alcon Inc.	34,161.86	16,801 05	17,360.81
04/12/2011	02/02/2009	100 Shares Alcon Inc.	17,080.93	8,394.98	8,685.95
05/27/2011	n/a	settlement Bristol Myers	59.19	0 00	59.19
04/25/2011	n/a	settlement Broadcom	5,220 42	0 00	5,220.42
06/15/2010	n/a	settlement Campbells Soup	790 58	0 00	790.58

JOHN STAUFFER CHARITABLE TRUST

Gains on Sales of Assets

For the Period 06/01/10 - 05/31/11

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10/04/2010	n/a	settlement DWS Int'l Fund	1,322.44	0.00	1,322 44
07/02/2010	10/24/1986	8100 Shares Royal Dutch	408,722 37	88,367 91	320,354 46
09/09/2010	n/a	settlement Tyco Int'l	1,372 41	0.00	1,372 41
09/24/2010	n/a	settlement Tyco Int'l	1,647.91	0.00	1,647 91
12/30/2010	n/a	settlement Unitedhealthcare	4,328 75	0.00	4,328 75
<u>Total Stocks</u>			\$936,258.91	\$371,906.39	\$564,352 52

BONDS & TREASURY NOTES

<u>Date Sold</u>	<u>Date Acq'd</u>	<u>Description</u>	<u>Sales Proceeds</u>	<u>Carrying Value</u>	<u>Gain</u>
12/22/2010	12/16/2009	\$500,000 Par Value - Due 12/22/2014 Federal Farm Credit Bank 3 0%	500,000.00	500,000.00	0.00
12/28/2010	12/17/2009	\$500,000 Par Value - Due 12/28/2015 Federal Farm Credit Bank 3 35%	500,000.00	500,000.00	0.00
09/17/2010	09/19/2005	\$250,000 Par Value - Due 09/17/2010 Federal Home Loan Banks 4.375%	250,000.00	250,000.00	0 00
04/14/2011	08/13/2008	\$150,000 Par Value - Due 04/14/2011 Federal Home Loan Banks 3 15%	150,000.00	150,000.00	0 00
11/26/2010	11/13/2008	\$500,000 Par Value - Due 11/26/2013 Federal Home Loan Banks 4.0%	500,000.00	500,000.00	0.00
02/24/2011	02/17/2009	\$500,000 Par Value - Due 02/24/2014 Federal Home Loan Banks 3 1%	500,000 00	500,000.00	0 00
10/20/2010	03/25/2009	\$500,000 Par Value - Due 10/20/2010 Federal Home Loan Banks 3 375%	500,000.00	500,000.00	0 00
06/07/2010	11/20/2009	\$375,000 Par Value - Due 06/07/2013 Federal Home Loan Banks 2 125%	375,000 00	375,000 00	0.00

JOHN STAUFFER CHARITABLE TRUST

Gains on Sales of Assets

For the Period 06/01/10 - 05/31/11

Schedule 3

08/25/2010	12/14/1995	\$33 83 Par Value - Due 09/01/2010 FNMA P250331	33 90	33 83	0 07
03/01/2011	02/04/2008	\$250,000 Par Value - Due 03/01/2011 Home Depot 5 2%	250,000 00	250,000 00	0 00
04/15/2011	04/17/2009	\$200,000 Par Value - Due 04/15/2011 Tricom Global 8 875%	200,000 00	200,000 00	0 00
12/15/2010	10/16/2006	\$185,000 Par Value - Due 12/15/2010 U.S Treasury Notes 4.375%	185,000 00	185,000 00	0 00
02/01/2011	10/10/2002	\$250,000 Par Value - Due 02/01/2011 Wells Fargo Bank	250,000 00	250,000 00	0.00
<u>Total Bonds</u>			<u>\$250,000 00</u>	<u>\$250,000 00</u>	<u>\$0 07</u>

TOTAL GAINS ON SALES OF ASSETS

\$564,352 59

JOHN STAUFFER CHARITABLE TRUST

Losses on Sales of Assets

For the Period 06/01/10 - 05/31/11

Schedule 9

<u>Date Sold</u>	<u>Date Acq'd</u>	<u>Description</u>	<u>Sales Proceeds</u>	<u>Carrying Value</u>	<u>Loss</u>
06/21/2010	06/04/2007	5,000 Shares Charles Schwab Co	77,073.42	112,437 95	35,364 53
06/21/2010	06/05/2007	5,000 Shares Charles Schwab Co	77,073.42	111,009 95	33,936 53
06/21/2010	06/07/2007	5,000 Shares Charles Schwab Co	77,073 42	107,154 95	30,081.53
06/21/2010	07/13/2007	10,000 Shares Charles Schwab Co	154,146.84	221,509 95	67,363 11
06/21/2010	08/08/2007	2,000 Shares Charles Schwab Co	30,829.37	38,835 95	8,006.58
06/21/2010	08/14/2007	3,000 Shares Charles Schwab Co	46,244.05	54,009 95	7,765.90
06/21/2010	08/22/2007	1,000 Shares Charles Schwab Co	15,414.68	19,509 95	4,095.27
06/21/2010	09/05/2007	4,000 Shares Charles Schwab Co	61,658 73	77,683 15	16,024 42
07/07/2010	06/05/2007	5,000 Shares Dentsply Int'l Inc.	151,704.45	180,380 95	28,676.50
07/07/2010	06/07/2007	5,000 Shares Dentsply Int'l Inc.	151,704 45	179,759.45	28,055.00
07/07/2010	06/18/2007	3,000 Shares Dentsply Int'l Inc.	91,022.67	110,055 95	19,033.28
07/07/2010	08/08/2007	1,000 Shares Dentsply Int'l Inc	30,340.89	37,113 95	6,773 06
07/07/2010	09/11/2007	1,000 Shares Dentsply Int'l Inc.	30,340.89	40,009 95	9,669.06
07/07/2010	03/20/2007	5,369 Shares General Electric Co	78,443.80	185,733 58	107,289 78
07/07/2010	06/05/2007	2,631 Shares General Electric Co	38,440.24	98,409 35	59,969.11

JOHN STAUFFER CHARITABLE TRUST

Losses on Sales of Assets

For the Period 06/01/10 - 05/31/11

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07/07/2010	08/14/2007	3,000 Shares General Electric Co.	43,831 52	113,399 45	69,567 93
07/07/2010	08/22/2007	2,000 Shares General Electric Co	29,221 01	77,759 95	48,538 94
07/07/2010	08/24/2007	2,000 Shares General Electric Co	29,221 01	78,789 95	49,568.94
07/07/2010	08/27/2007	1,000 Shares General Electric Co.	14,610 51	38,929 95	24,319 44
07/07/2010	09/05/2007	2,000 Shares General Electric Co	29,221 01	77,329.95	48,108 94
07/07/2010	09/07/2007	2,000 Shares General Electric Co.	29,221 01	77,569 95	48,348 94
07/01/2010	06/13/2007	2,000 Shares Medtronic Inc.	71,957.29	103,409 95	31,452.66
07/01/2010	06/15/2007	2,000 Shares Medtronic Inc.	71,957 29	104,909 95	32,952 66
07/01/2010	06/18/2007	2,000 Shares Medtronic Inc	71,957.29	105,149 95	33,192.66
07/01/2010	08/03/2007	2,000 Shares Medtronic Inc	71,957.29	104,049 95	32,092.66
07/01/2010	08/28/2007	2,000 Shares Medtronic Inc.	71,957 29	106,109 95	34,152.66
07/01/2010	11/06/2007	2,000 Shares Medtronic Inc	71,957.30	93,034 35	21,077.05
04/13/2011	02/02/2009	cash in lieu of 0.4 shares Novartis	22 13	22.25	0.12
07/02/2010	10/03/2007	1,000 Shares Royal Dutch Shell	50,459 55	79,659 95	29,200.40
07/02/2010	11/06/2007	900 Shares Royal Dutch Shell	45,413.60	76,122 95	30,709 35
			\$1,814,476 42	\$2,809,863 43	\$995,387 01

JOHN STAUFFER CHARITABLE TRUST

Losses on Sales of Assets

For the Period 06/01/10 - 05/31/11

Schedule 9

BONDS AND TREASURY NOTES

<u>Date Sold</u>	<u>Description</u>	<u>Sales Proceeds</u>	<u>Carrying Value</u>	<u>Loss</u>
05/19/2011	05/11/2009 \$500,000 Due: 05/19/2014 Federal Farm Credit Bank Notes	500,000.00	500,014.71	14.71
<u>Total Bonds and Treasury Notes</u>		\$500,000.00	\$500,014.71	\$14.71

TOTAL LOSSES ON SALES OF ASSETS

\$995,401.72