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 July 1 **, 2010, and ending** June 30 **, 20** 11

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
Wakerly Family Foundation

A Employer identification number
77-0441943

Number and street (or P O box number if mail is not delivered to street address)
373 Foxborough Drive

Room/suite

B Telephone number (see page 10 of the instructions)
650-968-9057

City or town, state, and ZIP code
Mountain View, CA 94041

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 ▶ ☐

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

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

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

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶ $ 6,854,306

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	0			
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	24,442	24,442		
	4	Dividends and interest from securities	30,092	30,092		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	5,668			
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)		5,668		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	60,202	60,202		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)	755	755		
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	40	40		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	795	795		
	25	Contributions, gifts, grants paid	290,500			290,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	291,295	795		290,500
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	(231,093)			
	b	**Net investment income** (if negative, enter -0-)		59,407		
	c	**Adjusted net income** (if negative, enter -0-)				

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Part II Balance Sheets

		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	5,434,875	5,158,168	5,158,168
	3	Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ 45,000 Less. allowance for doubtful accounts ▶	0	45,000	45,000
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule)	398,026	359,783	359,783
	b	Investments—corporate stock (attach schedule)	836,419	1,071,257	1,071,257
	c	Investments—corporate bonds (attach schedule)	219,689	220,099	220,099
	11	Investments—land, buildings, and equipment. basis ▶ Less. accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment. basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	6,889,009	6,854,307	6,854,307
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 (attach schedule)			
	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 ▶ ☑ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	6,889,009	6,854,307	
	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** (see page 17 of the instructions)	6,889,009	6,854,307	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	6,889,009	6,854,307	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	6,889,009
2	Enter amount from Part I, line 27a	2	(231,093)
3	Other increases not included in line 2 (itemize) ▶ change in unrealized capital gains	3	196,390
4	Add lines 1, 2, and 3	4	6,854,307
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	6,854,307

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	9250.694 sh FIREX	P	7/3/08	9/30/10
b	500 sh GDX	P	12/4/08	9/14/10
c	500 sh RWX	P	10/22/08	11/30/10
d	500 sh ISHG	P	1/29/10	1/27/11
e	Vanguard xxx905 acct, various capital-gains distributions	P	various	various

	(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	84,181.32		100,000.00	(15,818.68)
b	26,986 58		11,538 00	15,448.58
c	18,937 92		17,019 36	1,918.56
d	52,716.03		51,483.00	1,233.03
e				2,887.00

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				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	5,668
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	3,792

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	201,048	6,024,671	0.0334
2008	138,000	5,513,199	0.0250
2007	311,000	5,706,192	0.0545
2006	144,000	4,288,601	0.0336
2005	33,000	2,432,486	0.0136

2	**Total** of line 1, column (d)	2	0.1600
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	0.0320
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	6,699,566
5	Multiply line 4 by line 3	5	214,450
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	594
7	Add lines 5 and 6	7	215,044
8	Enter qualifying distributions from Part XII, line 4	8	290,500

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ 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	594	07
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	594	07
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	594	07
6	Credits/Payments:						
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	2,400	00			
b	Exempt foreign organizations—tax withheld at source	6b	0				
c	Tax paid with application for extension of time to file (Form 8868)	6c	0				
d	Backup withholding erroneously withheld	6d	0				
7	Total credits and payments. Add lines 6a through 6d				7	2,400	00
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached				8	0	
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	1,805	93
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ 1,800.00 **Refunded** ▶				11	5	93

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		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		✓
	*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		✓
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ________ **(2)** On foundation managers. ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
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.*	2		✓
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		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		✓
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	✓	
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*	7	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ CA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	✓	
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 on page 27)? *If "Yes," complete Part XIV*	9		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		✔
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✔
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✔	

Website address ▶ www wakerly.org/WFF

14 The books are in care of ▶ Michael Wakerly Telephone no. ▶ 650-968-9057

Located at ▶ 373 Foxborough Dr , Mountain View, CA ZIP+4 ▶ 94041-1667

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

			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		✔
	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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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		
	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		✔
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 ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 22 of the instructions.)	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. ▶ 20____ , 20____ , 20____ , 20____			
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.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✔
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		✔

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

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

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

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

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

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

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

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

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ✓

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

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

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
John F. Wakerly c/o 373 Foxborough Dr., Mtn. View, CA 94041	Pres., Chair, 2.5hr	-0-	-0-	-0-
Regina M. Rich c/o 373 Foxborough Dr., Mtn. View, CA 94041	VP, Secy , 1 0hr	-0-	-0-	-0-
Ralph T Wakerly c/o 373 Foxborough Dr., Mtn. View, CA 94041	Treas., 1.5hr	-0-	-0-	-0-
Michael J. Wakerly, Susanne D. Wakerly c/o 373 Foxborough Dr , Mtn. View, CA 94041	Director, 0.75hr	-0-	-0-	-0-

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services . . . . ▶		

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 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 Sisters of Notre Dame, Ipswich, MA. Below-market-rate loan used towards the construction of a dining room at the Notre Dame Girls Academy in Amoyo, Nigeria	45,000
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3 . . . . ▶	45,000

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:				
a	Average monthly fair market value of securities			1a	1,571,664
b	Average of monthly cash balances			1b	5,214,926
c	Fair market value of all other assets (see page 25 of the instructions)			1c	15,000
d	**Total** (add lines 1a, b, and c)			1d	6,801,590
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e			
2	Acquisition indebtedness applicable to line 1 assets			2	
3	Subtract line 2 from line 1d			3	6,801,590
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)			4	102,024
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4			5	6,699,566
6	**Minimum investment return.** Enter 5% of line 5			6	334,978

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

1	Minimum investment return from Part X, line 6			1	334,978
2a	Tax on investment income for 2010 from Part VI, line 5	2a	594		
b	Income tax for 2010. (This does not include the tax from Part VI)	2b	0		
c	Add lines 2a and 2b			2c	594
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	334,384
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	334,384
6	Deduction from distributable amount (see page 25 of the instructions)			6	0
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	334,384

Part XII Qualifying Distributions (see page 25 of the 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	290,500
b	Program-related investments—total from Part IX-B	1b	45,000
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	335,500
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 (see page 26 of the instructions)	5	594
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	334,906

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

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

		(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1	Distributable amount for 2010 from Part XI, line 7				334,384
2	Undistributed income, if any, as of the end of 2010.				
a	Enter amount for 2009 only			257,722	
b	Total for prior years: 20____,20____,20____		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: ▶ $ 335,500				
a	Applied to 2009, but not more than line 2a			257,722	
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d	Applied to 2010 distributable amount				77,778
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 page 27 of the instructions		0		
e	Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions			0	
f	Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				256,606
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	0			
8	Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)	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 page 27 of the instructions and Part VII-A, question 9)

1a 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			(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
2a 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 ⅔ of minimum investment return shown in Part X, line 6 for each year listed . .					
c "Support" alternative test—enter: **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) .					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization . .					
(4) Gross investment income . .					

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

1 Information Regarding Foundation Managers:

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

John F. Wakerly

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.

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

Check here ▶ ☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

See Statement #7

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

See Statement #7

c Any submission deadlines:

See Statement #7

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

See Statement #7

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 #8				
Total . . . . ▶ 3a				
b *Approved for future payment*				
Total . . . . ▶ 3b				

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 (See page 28 of the instructions.)
	(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					
4 Dividends and interest from securities . . .					
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					
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)					

13 **Total.** Add line 12, columns (b), (d), and (e) . . . . 13 ______

(See worksheet in line 13 instructions on page 29 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) (See page 29 of the instructions)

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)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

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

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

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

John F. Wakerly
Signature of officer or trustee

9/1/11
Date

President and Chair
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

Wakerly Family Foundation
Form 990-PF Statement #1
July 1, 2010 -- June 30, 2011

All securities are valued at June 30, 2011 market value	Amount
Part I, line 1 -- Contributions -- see schedule B if nonzero	0
Part I, line 16c -- Professional fees -- see Statement #2 (expenses)	755
Part I, line 18 -- Taxes -- see Statement #2 (expenses)	40
Part I, line 23 -- Other expenses -- see Statement #2 (expenses)	0
Part II, line 2bc -- Savings (TOTAL)	5,158,168
Fidelity x520 FMPXX	3,483,721
Fidelity x520 FDRXX	0
Fidelity x160 FMPXX	400,841
Fidelity x160 FDRXX	0
Vanguard xxx905 VMMXX	21,391
GCF Bank CD	1,000,000
GCF Bank MM accts	252,215
Part II, line 7 -- Other notes and loans receivable (TOTAL)	45,000
Sisters of Notre Dame PRI loan due March 11, 2014	45,000
Part II, line 10bc -- Investments, government obligations (TOTAL)	359,783
Fidelity x520 government bonds (see brokerage statement #3)	158,856
Vanguard xxx905 government bonds (see brokerage statement #4)	200,927
Part II, line 10bc -- Investments, corporate stock (TOTAL)	1,071,257
Fidelity x520 stocks (see brokerage statement #3)	916,678
Vanguard xxx905 stocks (see brokerage statement #4)	0
Agnilux, Inc stock-consideration escrow account	154,579
Part II, line 10bc -- Investments, corporate bonds (TOTAL)	220,099
Fidelity x520 corporate bonds (see brokerage statement #3)	0
Vanguard xxx905 corporate bonds (see brokerage statement #4)	220,099
Part II, line 16bc -- Total assets	6,854,307
Part III, line 3 -- Other increases	
Increase (decrease) in unrealized capital gains in securities since 6/30/2010	196,390

Wakerly Family Foundation
Form 990-PF Statement #2 (Expenses)
July 1, 2010 -- June 30, 2011

Date	Ref	Description	Amount
8/18/2010	F1330	William Naiditch CPA -- appraisal services	650 00
various	Fid520	Misc brokerage fees	105 00
		Total professional fees (line 16c)	755 00
n/a		Secretary of State -- Form SI-100	0 00
10/1/2010	F1331	Registry of Charitable Trusts -- Form RRF-1	150 00
10/2/2010	F1332	Franchise Tax Board -- Form 199	10 00
1/11/2010	Fdep	IRS refund check 2009 990PF	-120 47
n/a	Fid520	Foreign taxes	0 00
		Total taxes (line 18)	39 53
		Total other expenses (line 23)	0 00

Fidelity INVESTMENTS

FIDELITY PRIVATE
CLIENT GROUP℠

Envelope 135479417

WAKERLY FAMILY FOUNDATION
ATTN JOHN FRANCIS WAKERLY
373 FOXBOROUGH DR
MOUNTAIN VIEW CA 94041-1667

Investment Report

June 1, 2011 - June 30, 2011

Online	Fidelity com
FAST(sm)-Automated Telephone	800-544-5555
Private Client Group	800-544-5704

Wakerly Family Foundation 2010 Form 990PF Statement #3

* Government Obligations

* * Cash

All others Corporate Stock

Fidelity Account ℠ Z72-316520 WAKERLY FAMILY FOUNDATION

Private Client Group Account Executive: PATRICK TERRAZZANO, Team 352

Account Summary

Beginning value as of Jun 1	$4,579,601 20
Transaction costs, loads and fees	-15 90
Change in investment value	-20,330.73
Ending value as of Jun 30	**$4,559,254.57**
Your commission schedule	Gold
Account eligible trades from Jul 2010 - Jun 2011	13

Income Summary

	This Period	Year to Date
Taxable		
Dividends	$5,171 87	$12,937.39

Realized Gain/Loss from Sales

	This Period	Year to Date
Short-term gain	$0.00	$1,233.03

Holdings (Symbol) as of June 30, 2011	Performance June 30, 2011	Quantity June 30, 2011	Price per Unit June 30, 2011	Total Cost Basis	Total Value June 1, 2011	Total Value June 30, 2011
Stocks ***24% of holdings***						
ISHARES GOLD TRUST ISHARES ISIN #US4642851053 SEDOL #B0SF3S5 (IAU)		5,000.000	$14 640	$47,863 00	$74,950 00	$73,200 00
* ISHARES BARCLAYS TREAS INFLATION PROTECTED SECS FD (TIP)		1,100 000	110.640	102,340.34	121,946 00	121,704.00
MARKET VECTORS ETF TR GOLD MINERS ETF FD (GDX)		700.000	54.590	15,611.00	40,705.00	38,213.00

Investment Report

June 1, 2011 - June 30, 2011

Fidelity Account ℠ **Z72-316520** WAKERLY FAMILY FOUNDATION
Private Client Group Account Executive: PATRICK TERRAZZANO, Team 352

Holdings (Symbol) as of June 30, 2011	Performance June 30, 2011	Quantity June 30, 2011	Price per Unit June 30, 2011	Total Cost Basis	Total Value June 1, 2011	Total Value June 30, 2011
MARKET VECTORS ETF TR AGRIBUSINESS ETF (MOO)		200.000	53 790	10,109.95		10,758.00
SPDR GOLD TR GOLD SHS (GLD)		1,500 000	146.001	133,539 95	224,460 00	219,001 50
SPDR INDEX SHS FDS S&P GLOBAL NAT RES ETF (GNR)		700 000	59.727	42,502 80	43,001.00	41,808.90
SPDR INDEX SHS FDS DJ WILSHIRE INTL REAL ESTATE ETF (RWX)		800.000	40.380	28,790.17	32,960.00	32,304.00
* SPDR SER TR DB INTL GOVT INFLATION PROTECTED (WIP)		600 000	61.920	30,712.00	37,380.00	37,152.00
SPDR SER TR DJ WILSHIRE REIT ETF (RWR)		1,600 000	66.600	77,693 00	111,104.00	106,560.00
SPDR SER TR S&P OIL & GAS EQUIP & SVCS ETF (XES)		1,500 000	41.470	39,915 95	62,985.00	62,205.00
VANGUARD TAX-MANAGED INTL FD MSCI EAFE ETF (VEA)		1,500.000	38.080	39,134.00	57,825.00	57,120.00
VANGUARD INDEX FDS VANGUARD REIT ETF FORMERLY VANGUARD INDEX TR TO 05/24/01 REIT VIPER SHS (VNQ)		1,100.000	60.100	51,338.89	68,948.00	66,110.00
VANGUARD INDEX FDS VANGUARD SMALL CAP VALUE VIPERS FORMERLY VANGUARD INDEX TR (VBR)		300 000	70 080	11,282.00	21,471.00	21,024.00
VANGUARD INDEX FDS VANGUARD VALUE VIPERS FORMERLY VANGUARD INDEX TR (VTV)		1,700.000	56.050	61,497.00	97,920.00	95,285.00
VANGUARD INDEX FDS VANGUARD TOTAL STK MKT ETF (VTI)		900 000	68.400	32,519.00	62,955.00	61,560.00
WISDOMTREE TR EMERGING MKTS SMALLCAP DIVID FD (DGS)		600.000	52.530	31,201.70	21,880.00	31,518.00
Mutual Funds ***76% of holdings***						
** FIDELITY INSTL MMKT PORT CL I (FMPXX)	*7-day Yield 0 13%*	3480,447 080	1.000	not applicable	3,499,111 20	3,480,447.08
Core Account ***0% of holdings***						
** FIDELITY CASH RESERVES (FDRXX)		3,284.090	1.000	not applicable		3,284.09

Wakerly Family Foundation 2010 Form 990PF Statement #4

Vanguard

Client Services > 800-662-2739

www.vanguard.com

June 30, 2011, quarter-to-date statement

* Government Obligations

* * Cash

* * * Corporate Bonds

▶ Wakerly Family Foundation

Vanguard funds

		Fund & Account	Ticker Symbol	Average Cost	Total Cost	Value on 03/31/2011	Value on 06/30/2011
* * *	Short-Term Invest-Gr Adm	0539-88031154905	VFSUX	$9 88	$202,366 64	$219,484 69	$220,098 92
*	Short-Term Federal Adm	0549-88031154905	VSGDX	10 79	200,000 00	199,073 21	200,926 78
* *	Prime Money Mkt Fund	0030-88031154905	VMMXX	-	-	19,228 97	21,390 68
						$437,786.87	**$442,416.38**

Vanguard funds activity detail

Short-Term Invest-Gr Adm 0539-88031154905

Purchases	Withdrawals	Dividends
$0 00	$0 00	$1,594 41

30-day SEC yield as of 06/30/2011* 1 66%

*Based on holdings' yield to maturity for last 30 days, distribution may differ For updated information, visit vanguard.com.

Date	Transaction	Amount	Share Price	Shares Transacted	Total Shares Owned	Value
	Beginning balance on 3/31/2011		$10 72		20,474 318	$219,484 69
04/29	Dividend to Prime MM	$540 01			20,474 318	
05/31	Dividend to Prime MM	541 25			20,474 318	
06/30	Dividend to Prime MM	513 15			20,474 318	
	Ending balance on 6/30/2011		**$10.75**		**20,474.318**	**$220,098.92**

Wakerly Family Foundation 2010 Form 990PF

Statements #5 + #6 Blank

Wakerly Family Foundation

a private charitable foundation
Kate Wakerly (1948-2004), Founding President

Statement of Purpose

The Wakerly Family Foundation (WFF), a private foundation, provides financial assistance to qualified public charitable organizations, with a focus on the areas of social services, education, and economic development. We support organizations that receive the majority of their funding from private (non-governmental) sources. **WFF does not consider unsolicited proposals**, and this policy is expected to continue indefinitely. Most grants are made in local areas where one or more WFF board members can monitor needs and outcomes.

WFF's board of directors is responsible for identifying charitable giving opportunities that are consistent with the foundation's purpose, and is especially interested in funding projects and programs which:

- benefit private education, and assist faculty at private schools, including retired faculty who are members of religious orders. Programs which enhance education in English, math, and science are also encouraged.
- support children in at-risk or economically disadvantaged households.
- help to provide additional low-income and very-low-income housing, especially owner-occupied housing.
- foster job skills training, especially for people who are unemployed or under-employed, with a goal of assisting workers toward full economic self-sufficiency. A particular focus is households that have experienced the loss of a parent and may be struggling financially.
- create new areas of employment through entrepreneurship. Projects that create new jobs for people who have difficulty finding traditional types of employment are encouraged.
- assist immigrants to the U.S. in the areas of education, employment, and housing.
- assist low-income populations with self-help projects including small, starter businesses which will employ members of those populations in their own communities.
- provide direct assistance or emergency aid to an economically disadvantaged population, with particular interest in programs that provide or facilitate access to quality, affordable health care for working, low-income individuals and families.
- promote individual responsibility and economic freedom.

WFF is especially interested in supporting relatively small, low-overhead organizations and programs that can obtain high leverage using WFF's grants.

Organizations and entities that are not eligible or are not normally considered for funding by WFF include:

- any organization which is not a 501(c)3 public charity
- government agencies, or entities receiving the majority of their support from government sources at the local, state, or federal level (including public schools)
- political parties and lobbying organizations

Grants available and funding cycle

Any WFF board member may invite a qualified organization to request a grant of up to $10,000. Generally, grants will range from $1,000 to $10,000 and will be given for one year. Proposals will be reviewed by one or more board members, depending on the request size. Selected applicants may also request funding beyond $10,000 for special projects, but these will require additional consideration and review by WFF's full board of directors. WFF's total annual grant-making budget is on the order of $250,000.

Organizations will be asked to apply for grants at various times throughout the year. WFF's fiscal year runs from July 1 to June 30.

When you are asked to apply for funding, please submit a brief proposal (1 to 2 pages is fine) describing your organization and the program or project for which funding is requested. Your proposal should address the following points as applicable:

- What is the program for which you are seeking support?
- What community needs will be served by this program? What challenges will this program help participants overcome?
- Who are the target populations (demographic, geographic) that will be served?
- What other organizations or agencies are serving your target population, and how will your project differ from the services currently offered? How will your organization work together with other entities for the benefit of your clients?
- What are the expected outcomes of your project or program? How and how often will you evaluate the effectiveness of your program?
- What are the expected consequences if your project/program is not implemented?
- What is the total cost of your project or program, and for what portion of that total are you requesting WFF support?
- You may also be asked to include one or more of the following: certification of your organization's status under IRS Section 501(c)3 (if not available at guidestar.org); names and affiliations of your board members; projected budget for the year for which you are seeking funding; your program ratio (percentage of funds that go directly to your cause); an overview of your financial statements including major sources and uses of funds.

After receiving your proposal and any supplemental materials required, one or more WFF board members will determine whether your project or program can receive funding in the current fiscal year. At that time, your proposal may be funded immediately, or additional information and/or a site visit may be requested. If your proposal is selected for funding or further consideration, a board member will generally respond within one month.

Solicited proposals can be submitted only by email and should be directed to:

John Wakerly, President, Wakerly Family Foundation
Email: <WFF's president's first name> at wakerly.com

Latest revision 8/13/2008

Wakerly Family Foundation 2010 Form 990PF Statement #8

Wakerly Family Foundation
Grants for Fiscal year 2010 - 2011

7-23-10, Marquette University, Milwaukee, WI. College of Engineering Discovery Learning Center capital project, in particular for offices to attract underserved and minority high school students to engineering.	$200,000.00
7-23-10, Northern Illinois Food Bank, St. Charles, IL. Food acquisition and distribution programs.	$ 10,000.00
7-23-10, City Lights, Chicago, IL. For the Elam Davies Social Services Center for homeless outreach – food and clothing.	$ 10,000.00
7-23-10, Howard County Community Action Council, Columbia, MD. Housing, energy, and emergency assistance for low-income residents.	$ 500.00
10-19-10, Day Worker Center of Mountain View, CA. Grant towards final costs of new building for worker programs.	$ 20,000.00
10-26-10, Cristo Rey Jesuit High School. Eight financial-aid awards for needy families to send their children to this work-study high school	$ 10,000.00
11-10-10, Silicon Valley Community Foundation, for Mtn. View Voice Holiday Fund, Mtn. View, CA. Contribution to newspaper's annual fund, which distributes money to local charities in the Palo Alto, Mountain View and East Palo Alto communities.	$ 11,000.00
11-10-10, Sustainable Living Foundation, Los Altos, CA. African relief.	$ 8,000.00
11-11-10, Villa Siena Foundation, Mountain View, CA. General support for Villa Siena residential nursing care facility.	$ 1,000.00
11-20-10, Bear Necessities, Chicago, IL. Unrestricted grant for. operating costs and/or capital campaign for pediatric cancer aid.	$ 10,000.00
12-20-10, Humanitarian Service Project, Chicago, IL. Food and gifts for underprivileged Children's Birthday Project.	$ 10,000.00
3-14-11, Sisters of Notre Dame, Ipswich, MA. PRI loan for major capital project for Notre Dame Girls' Academy in Amoyo, Nigeria.	$ 45,000.00
Total granted (11 grants plus 1 PRI loan):	$335,500.00