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 August 1 **, 2010, and ending** July 31 **, 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 Albert and Elaine Borchard Foundation, Inc.		**A Employer identification number** 95-3294377
Number and street (or P O box number if mail is not delivered to street address) 22055 Clarendon Street	Room/suite 210	**B** Telephone number (see page 10 of the instructions) 818-888-2871
City or town, state, and ZIP code Woodland Hills, Ca. 91367		**C** If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 24,116,420

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

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

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).)*

	Line	Description	(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)				
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	44,645	3,551		
	4	Dividends and interest from securities	146,212	124,102		
	5a	Gross rents	1,723,328	1,723,328		
	b	Net rental income or (loss) 1,307,058				
	6a	Net gain or (loss) from sale of assets not on line 10	19			
	b	Gross sales price for all assets on line 6a 500,000				
	7	Capital gain net income (from Part IV, line 2)				
	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) 1a	16,466	12,525		
	12	**Total.** Add lines 1 through 11	1,930,670	1,863,506		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	171,000	139,758		31,242
	14	Other employee salaries and wages	7,000	5,721		1,279
	15	Pension plans, employee benefits	0	0		
	16a	Legal fees (attach schedule)	0	0		
	b	Accounting fees (attach schedule)	0	0		
	c	Other professional fees (attach schedule) 1	87,770	71,735		16,035
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions) 1	203,802	166,567		37,235
	19	Depreciation (attach schedule) and depletion 3	55,795	55,795		
	20	Occupancy	22,921	18,733		4,188
	21	Travel, conferences, and meetings	17,502	14,304		3,198
	22	Printing and publications				
	23	Other expenses (attach schedule) 1	293,911	194,280		99,631
	24	**Total operating and administrative expenses.** Add lines 13 through 23	859,701	666,893		192,808
	25	Contributions, gifts, grants paid	1,108,088			1,108,088
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,967,789	666,893		1,300.896
	27	Subtract line 26 from line 12.				
	a	**Excess of revenue over expenses and disbursements**	(37,119)			
	b	**Net investment income** (if negative, enter -0-)		1,196,613		
	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 (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash—non-interest-bearing	130,443	40,537	40,537
	2 Savings and temporary cash investments	669,657	624,143	624,143
	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) ▶ 2c			
	Less allowance for doubtful accounts ▶		72,105	72,105
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule) 2a	1,233,551	983,570	1,085,000
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ 10,509,504			
	Less accumulated depreciation (attach schedule) ▶ 6,412,076	4,153,223	4,097,428	16,340,891
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule) 2	3,484,177	3,892,438	4,093,744
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶ Education Center)	440,547	440,547	1,860,000
	16 **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	10,111,598	10,150,768	24,116,420
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)			
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	8,417,777	8,494,066	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	1,693,821	1,656,702	
	30 **Total net assets or fund balances** (see page 17 of the instructions)	10,111,598	10,150,768	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	10,111,598	10,150,768	

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	10,111,598
2	Enter amount from Part I, line 27a	2	(37,119)
3	Other increases not included in line 2 (itemize) ▶ schedule 2b	3	76,289
4	Add lines 1, 2, and 3	4	10,150,768
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	10,150,768

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	$250,000 f v U S Treasury Note 2 375% due 08-31-10	P	09-02-08	08-31-10
b				
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	250,000	0	249,981	19
b				
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				
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	19
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	

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	1,215,942	21,834,917	0 55687
2008	1,431,274	19,635,310	0 72892
2007	1,190,462	20,514,808	0 58029
2006	984,336	19,463,451	0 50574
2005	983,955	19,188,085	0 51279

2	**Total** of line 1, column (d)	2	2 88461
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 57692
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	22,052,752
5	Multiply line 4 by line 3	5	1,272,267
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	11,966
7	Add lines 5 and 6	7	1,284,233
8	Enter qualifying distributions from Part XII, line 4	8	1,200,896

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	23,932
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	
3	Add lines 1 and 2	3	23,932
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	23,932
6	Credits/Payments:		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 6a: 14,000		
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	14,000
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	9,932
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶	**Refunded** ▶	11	

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) ▶ California			
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)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see 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 ▶

14 The books are in care of ▶ Heidi Galke Telephone no. ▶ 818-888-2871
Located at ▶ 22055 Clarendon Street #210 Woodland Hills ZIP+4 ▶ 91367-6355

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 ▶ France			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☑ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	1b		✓
	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
see schedule 4		$171,000		

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
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
Heidi Galke 22055 Clarendon Street #210 Woodland Hills, Ca 91367	administration and financial services	53,500
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	
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	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3 ▶	

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	4,898,167
b	Average of monthly cash balances	1b	1,114,678
c	Fair market value of all other assets (see page 25 of the instructions)	1c	16,412,996
d	**Total** (add lines 1a, b, and c)	1d	22,425,841
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	22,425,841
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	373,089
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	22,052,752
6	**Minimum investment return.** Enter 5% of line 5	6	1,102,638

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	1,102,638
2a	Tax on investment income for 2010 from Part VI, line 5 . . 2a 23,932		
b	Income tax for 2010 (This does not include the tax from Part VI) . . 2b 0		
c	Add lines 2a and 2b	2c	23,932
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,078,706
4	Recoveries of amounts treated as qualifying distributions	4	2,797
5	Add lines 3 and 4	5	1,081,503
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	1,081,503

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	1,300,896
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	0
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) $100,000 Beling Fund U.S.C. paid 9-30-10	3b	(100,000)
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,200,896
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	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,200,896

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					1,081,503
2	Undistributed income, if any, as of the end of 2010.					
a	Enter amount for 2009 only					
b	Total for prior years 20___,20___,20___					
3	Excess distributions carryover, if any, to 2010:					
a	From 2005					
b	From 2006					
c	From 2007					
d	From 2008	426,898				
e	From 2009	134,875				
f	**Total** of lines 3a through e		561,773			
4	Qualifying distributions for 2010 from Part XII, line 4: ▶ $ 1,200,896					
a	Applied to 2009, but not more than line 2a					
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)					
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)					
d	Applied to 2010 distributable amount					1,081,503
e	Remaining amount distributed out of corpus		119,393			
5	Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*					
6	**Enter the net total of each column as indicated below:**					
a	Corpus. Add lines 3f, 4c, and 4e Subtract line 5		681,166			
b	Prior years' undistributed income. Subtract line 4b from line 2b					
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					
d	Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions					
e	Undistributed income for 2009 Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions					
f	Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011					
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)					
8	Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)					
9	**Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a		681,166			
10	Analysis of line 9:					
a	Excess from 2006					
b	Excess from 2007					
c	Excess from 2008	426,898				
d	Excess from 2009	134,875				
e	Excess from 2010	119,393				

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

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

n/a

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.

n/a

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:

Albert and Elaine Borchard Foundation
22055 Clarendon Street #210, Woodland Hills, Ca 91367

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

see website: www borchardfoundation org

c Any submission deadlines:

April 1 and October 1

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

no grants to individuals

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 schedule 5				1,108,088
Total . . . . ▶ 3a				1,108,088
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	not	applicable			
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)
	not applicable

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

Edward D. Spurgeon 11/9/11 president

Signature of officer or trustee Edward D. Spurgeon Date Title

Paid Preparer Use Only

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

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2011
Tax ID No. 95-3294377

SCHEDULE 1a

OTHER INCOME

Received from Robert C. Cox Insurance Service refund of overpayment of fire/liability insurance	$	1,585.74
U.S.C. refund of unused portion of $ 35,000 grant – Penelope Trickett – summer 2009 conference		537.04
U.C.S.B. refund of unused portion of $ 30,000 grant – scholar in residence – Patrick McCray		89.82
UC IRVINE refund of unused portion of $ 30,000 grant – scholar in residence – Dr. John B. Culbert		1,030.34
UNIVERSITY OF TEXAS refund of unused portion of grant		98.24
WILLIAM MITCHELL COLLEGE OF LAW refund of unused portion of $ 14,000 grant (Dayton/Doron)		1,041.07
Vanguard GNMA Fund – long- term capital gain distributions		7,557.46
Vanguard – Intermediate Term Treasury Fund – long- term capital gain distributions		1,144.08
Vanguard – Short-Term Investment Grade Fund- long-term capital gain distributions		3,381.88
TOTAL OTHER INCOME:	$	16,465.67

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2011
Tax ID No. 95-3294377

SCHEDULE 1

	AMOUNT
OTHER PROFESSIONAL FEES	
HEIDI GALKE administration and financial services	$ 53,500.00
ROTHSTEIN/KASS, CPA audit of 07-31-10 financial statements	20,015.00
PAMELA ROSS consulting services re 990PF Part XIII	80.00
MARY JANE CICCARELLO professional services to 07-31-11 re Center on Law and Aging	1,500.00
JOHN LAFRENIERE Quick Books installation, etc.	130.00
STIVERS STAFFING SERVICE professional services by Roubina Movsessian re Quick Books, etc. from October to April, 2011	12,545.24
TOTAL OTHER PROFESSIONAL FEES:	**$ 87,770.24**
TAXES	
LOS ANGELES COUNTY TAX COLLECTOR - 2010/2011 real property taxes	$ 186,133.50

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2011
Tax ID No. 95-3294377

	AMOUNT
OFFICE OF FINANCE, CITY OF LOS ANGELES business taxes for rental properties for 2011	2,216.24
Estimated excise tax for fiscal year ended 07-31-11	14,000.00
Balance excise tax fiscal year ended 07-31-10	671.00
Employer social security/Fica taxes	781.00
TOTAL TAXES:	**$203,801.74**

TRAVEL/CONFERENCES/MEETINGS

Disbursed to MICHAEL SPURGEON reimbursement for costs advanced : airfare Sacramento/Burbank and return re Board meeting 12-11-10, 05-20-11 and special retreat meeting 03-25-11, airport parking, cab, hotel, car rental, misc. expenses re visit to Sunny Hills Services – transportation and parking	1,528.74
Disbursed to JANNA BELING reimbursement for costs advanced: mailbox rental, postage, Quicken back-up for International Education Center, selection committee lunch meeting, airfare LAX-Nantes and return for conference-summer 2011	2,240.35

Disbursed to
KRISTEN BELING
reimbursement for costs advanced:
airfare re board meeting 05-28-10, hotel and car rental, airfare Las Vegas-Nantes re summer 2010 conference, car rental airfare Las Vegas/Burbank re meeting with USC re $ 100,000 scholarship fund for Bill and Betty Beling, airport parking and hotel, meeting with IR scholarship recipients, International Education Center conference

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2011
Tax ID No. 95-3294377

		AMOUNT
and scholars in residence committee meeting 10-4 to 10-5-10, car rental and parking, etc.		$ 5,834.69
Disbursed to STEPHEN SPURGEON reimbursement for costs adanced re retreat meeting 03-25-11, hotel, cab, airfare Portland/Burbank and return		795.91
Disbursed to EDWARD D. SPURGEON reimbursement for costs advanced 08-01-10 to 07-31-11 per itemized billing for travel and lodging re board meetings, staff meetings, inspections of and meetings re real estate properties, attendance in Austin, Texas of National Association of Small Foundations meeting/ seminar		7,102.27
TOTAL TRAVEL/CONFERENCES/MEETINGS:	**$**	**17,501.96**

OTHER EXPENSES

Cushman & Wakefield, lease commission re 1900 Sacramento Street, Los Angeles	$	36,000.00
Klabin Co. – lease commission re 1900 Sacramento Street, Los Angeles		36,000.00
Roof Toppers, Inc. roof repairs for 1805, 1811, 1899 and 1900 Sacramento Street, 1101-1131 Mateo Street and 1102 and 1104 Lawrence Street		21,235.00
The Gas Co. – 1104 S. Lawrence		1,100.81
Gene V. Pira, Inc. – 1900 Sacramento Street		
Reg. 4 fire sprinkler system testing		1,350.00
Property insurance		132,235.26
Workers compensation insurance		632.31
Miscellaneous office expenses (telephone, storage, Federal express, supplies (including website, bank charges, postage, filing fees,ASBF membership fees, etc.)		8,663.04

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2011
Tax ID No. 95-3294377

	AMOUNT
Education Center operating expenses, conference expenses	$ 47,426.27
Center on Law & Aging operating expenses	8,981.02
PayChex monthly fees re payroll	287.05
TOTAL OTHER EXPENSES:	**$ 293,910.76**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED JULY 31, 2011
Tax ID No. 95-3294377

SCHEDULE 2a

U.S. TREASURY NOTES		ADJUSTED COST		MARKET VALUE
$ 500,000 face value U.S. Treasury Note due 02-15-14, YTM 4.409%	$	483,860.72	$	543,906.00
$ 200,000 face value U.S. Treasury Note due 08-15-2019, 3.625% p.a.	$	203,460.00	$	216,436.00
$ 300,000 face value U.S. Treasury Note due 08-15-2019, 3.625% p.a.	$	296,250.00	$	324,657.50
TOTAL U.S. TREASURY NOTES:	$	983,570.72	$	1,084,999.50

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2011
Tax ID no. 95-3294377

SCHEDULE 2b

PART III – LINE 3

OTHER INCREASES

	AMOUNT
Promissory Note of TLC Freight Lines, tenant at 1899 Sacramento Street, Los Angeles, for deferred rent	$ 72,105
Security deposits	1,983
Unrealized exchange rate gain Euro Dollar vs. U.S. Dollar re International Education Center, Missillac, France	2,201
TOTAL OTHER INCREASES:	$ 76,289

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2011
TAX ID No. 95-3294377

SCHEDULE 2c

NOTES RECEIVABLE

	AMOUNT
$ 72,104.54 Promissory Note of TLC Freight Lines, Inc. and Carlos Monacco, 5% p.a. from 11-09-2010, interest payable 12-31-2010 and quarterly thereafter, maturity: 03-09-2012 note represents deferred rent payments for 1899 Sacramento Street, Los Angeles, California	$ 72,104.54

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED 07-31-2011
Tax ID No. 95-3294377

SCHEDULE 2

OTHER INVESTMENTS

	COST	MARKET VALUE
9,765.698 shares VANGUARD TOTAL STOCK MARKET INDEX FUND – Admiral	$ 260,816.05	$ 317,873.47
9,034.422 shares VANGUARD INTERMEDIATE TERM TREASURY FUND	$ 99,472.09	$ 106,244.80
157,863.742 shares VANGUARD GNMA FUND-Admiral	$ 1,645,108.17	$ 1,738,079.80
22,538.657 shares VANGUARD INFLATION PROTECTED SEC. FUND – Admiral	$ 552,893.98	$ 617,108.43
112,247.249 shares VANGUARD SHORT-TERM INVESTMENT GRADE FUND-Admiral	$ 1,195,346.05	$ 1,211,147.82
4,524.288 shares IVY GLOBAL NATURAL RESOURCES FUND CL.A	$ 138,802.29	$ 103,289.49
TOTAL OTHER INVESTMENTS:	**$ 3,892,438.63**	**$ 4,093,743.81**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED 07-31-2011
TAX ID NO. 95-3294377

SCHEDULE 3 - DEPRECIATION

Description	Acquired	Cost	Deprec. Base	Deprec. Prior Yrs	Remaining Cost	Deprec. This Year
Fax Sharp UX120	06-04-94	847	847	847	-	-
Office fixt.	various	13,603	13,603	13,603	-	-
1805/1811 Sacramento	03-31-86	706,281	378,226	378,226	-	-
1805 Sacr.- light fixtures	04-07-97	5,620	5,620	5,250	370	370
1899 Sacramento	03-31-86	690,770	457,884	457,884	-	-
1900 Sacramento	03-31-86	3,241,790	1,947,460	1,947,460	-	-
railroad spur – 1900 Sacramento	03-31-86	30,033	-	-	-	-
1101-1131 Mateo St.	03-31-86	2,491,650	1,386,956	1,386,956	-	-
roof-Mateo	03-31-86	43,040	43,040	43,040	-	-
refrigeration equipment – Mateo St.	07-31-96	38,000	38,000	35,462	2,538	2,538
1104 Lawrence Street	03-31-86	1,060,000	1,060,000	1,060,000	-	-
roof – 1900 Sacramento Street	05-20-92	160,563	160,563	160,563	-	-
various improvements to 1900 Sacr. & parking lot	1995	332,828 less34,363= 298,465	298,465	298,465	-	-
Lot 8th & Wilson	08-11-93	589,518	-	-	-	-
Lot 8th & Lemon	01-07-97	94,919	-	-	-	-

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED 07-31-2011
TAX ID NO. 95-3294377

Description	Acquired	Cost	Deprec. Base	Deprec. Prior Yrs.	Remaining Cost	Deprec. This Year
Fence for 8th & Lemon	12-26-98	5,975	5,975	5,975	-	-
Construct. costs re seismic retrofit of bldgs at 1805/11/99 Sacramento & 1104 Lawrence/1101-1131 Mateo St.	1996/97/98	194,952	194,952	181,774	13,178	13,178
new roof at 1104 Lawrence	1998	55,881	55,881	48,425	7,456	3,725
new roof at 1102 Lawrence	04-07-09	14,450	14,450	1,926	12,524	963
new roof at 1101-1131 Mateo	1998/99	121,182	121,182	104,976	16,206	8,100
new roof at 1805 Sacramento	03-31-99	18,876	18,876	15,096	3,780	1,258
new roof at 1811 Sacramento	03-24-00	30,206	30,206	22,154	8,052	2,014
new roof at 1899 Sacramento	06-30-03	45,592	45,592	24,312	21,280	3,039
new asphalt paving – Mateo	09-24-99	24,500	24,500	17,963	6,537	1,633
new asphalt paving – 1805/11 Sacramento	02-05-01	24,123	24,123	16,080	8,043	1,608
rolling steel doors – 1805 Sacramento	06-01-01	9,931	9,931	9,931	-	-

Description	Acquired	Cost	Deprec. Base	Deprec. Prior Years	Remaining Cost	Deprec. This Year
heat/aircond. unit 1102 Lawrence	01-22-01	6,200	6,200	6,200	-	-
heat/aircond. unit 1104 Lawrence, 2nd Fl.	03-04-02	5,250	5,250	5,250	-	-
Filing Cabinets	06-02-09	3,589	3,589	1,436	2,153	718
new office/bath – 1805 Sacramento	08-20-01	14,894	14,894	8,937	5,957	993
new asphalt job-parking lot 1104 Lawrence	11-28-03	62,134	62,134	28,994	33,140	4,142
1900 Sacramento new asphalt paving	01-26-05	72,730	72,730	29,094	43,636	4,849
1900 Sacramento tenant improvements	12-30-04 and various	100,000	100,000	40,002	59,998	6,667
1900 Sacramento – 6,684 sq. ft. acqd.-driveway property	06-01-07	**233,940**	-	-	-	-
TOTALS:		**10,509,504**	-	**6,356,281**	-	**55,795**

Albert & Elaine Borchard Foundation – Fiscal 07-31-2011 – Tax ID No. 95-3294377

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2011
Tax ID No. 95-3294377

SCHEDULE 4

ATTACHMENT TO PART VIII, LINE 1

NAME AND ADDRESS	TITLE	TIME	COMPENSATION
Edward D. Spurgeon c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director/ President	part- time	$ 59,500
Janna Beling c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director, Exec. Vice President	part- time	$ 38,000
Kristen Beling c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director	part- time	$ 24,000
Michael Spurgeon c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director	part- time	$ 19,000
Stephen Spurgeon c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, Ca. 91367	Director	part- time	$ 14,000
Heidi Galke c/o Foundation office 22055 Clarendon St., # 210 Woodland Hills, Ca. 91367	Director	part- time	$ 16,500
TOTAL LINE 1 PART VIII			**$ 171,000**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Year Ended 07-31-2011
Tax ID No. 95-3294377

Schedule 5

	GRANTS	AMOUNT
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA USC College Advancement College of Letters, Arts & Sciences 444 South Flower, 41st Floor Los Angeles, California 90071	
09/30/10	grant for Willard & Betty Beling student scholars award fund per gift agreement	$ 100,000.00
	Disbursed to VOLUNTEERS OF AMERICA GREATER LOS ANGELES 3600 Wilshire Boulevard, Suite 1500 Los Angeles, California 90010	
10/05/10	grant in support of first 12 months of operation of "Women's Care Cottage"	25,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Sponsored Projects Accounting File # 52095 Los Angeles, California 90074-2095	
10/18/10	grant for research by Prof. Jay Bartroff, scholar-in-residence, fall semester 2010, Missillac, France	30,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA/ THORNTON SCHOOL OF MUSIC Los Angeles, California 90089	
11/04/10	grant in support of music programs	5,000.00
	Disbursed to FOODBANK OF SOUTHERN CALIFORNIA/ 144 San Francisco Avenue Long Beach, California 90813	
12/12/10	grant in support of Food Distribution Program	12,500.00

	GRANTS		AMOUNT
	Disbursed to LOS ANGELES MISSION 303 East 5th Street Los Angeles, California 90013		
12/12/10	grant to feed homeless & hungry in Los Angeles	$	5,000.00
	Disbursed to UNION RESCUE MISSION 545 S. San Pedro Street Los Angeles, California 90013		
12/12/10	grant to provide food & shelter for women, children experiencing homelessness in LA		5,000.00
	Disbursed to RESCUE MISSION Alliance Valley Food Bank 12701 Van Nuys Boulevard, Suite A Pacoima, California 91331		
12/12/10	grant in support of Fighting Hunger, Feeding Hope Program		12,500.00
	Disbursed to PET ADOPTION FUND 7515 Deering Avenue Canoga Park, California 91303		
12/12/10	grant to help abused & abandoned animals to be adopted		5,000.00
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (UCSB) Santa Barbara, California 93106		
12/12/10	grant in support of pianist Jean-Yves Thibaudet Feb 2011 engagement UCSB		5,000.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Year Ended 07-31-2011
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	GRANTS	AMOUNT
	Disbursed to SACRAMENTO PUBLIC LIABRARY 828 I Street Sacramento, California 95814	
01/19/11	grant for 826 National literacy center for youth in Sacramento County	$ 10,000.00
	Disbursed to STUDENTS RUN AMERICA 6505 Zelzah Avenue Reseda, California 91335	
01/24/11	grant for SRLA scholarship grants 2011	8,000.00
	Disbursed to HEALTH VOLUNTEERS OVERSEAS 1900 L St., NW, Suite 310 Washington, DC 20036	
01/24/11	grant for 3rd year expenses except staff costs re information technology project	20,000.00
	Disbursed to BEYOND SHELTER 1200 Wilshire Boulevard, Suite 600 Los Angeles, California 90017	
01/24/11	grant in support of "Housing First" program for homeless families	10,000.00
	Disbursed to THE POET TREE, INC. (Sacramento Poetry Center) 1719 25th Street Sacramento, California 95816	
01/24/11	grant for three program expansions: Confluence of Poets, Put poetry on buses, Continue with writing workshop series at local libraries	5,500.00

	GRANTS		AMOUNT
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (UCSB) Santa Barbara, California 93106		
01/24/11	grant for Borchard Foundation Fellowship in European Studies 2010/2011	$	25,000.00
	Disbursed to NEVADA PARTNERSHIP FOR HOMELESS YOUTH P.O. Box 20135 Las Vegas, Nevada 89112		
01/24/11	grant for services at the William Fry Drop-In Center		15,000.00
	Disbursed to CARE 369 Pine Street, Suite 700 San Francisco, California 94104		
01/24/11	grant for Pakistan Flood Emergency		15,000.00
	grant for Haiti Cholera Response Fund		15,000.00
	Disbursed to ASIAN PACIFIC ISLANDER LEGAL OUTREACH 1121 Mission Street San Francisco, California 94103		
01/24/11	grant for translation costs of linguistically & culturally appropriate API focused elder abuse educational & information materials		2,500.00
	Disbursed to SIERRA CURTIS NEIGHBORHOOD ASSN. 279 24th Street Sacramento, California 95818		
01/24/11	grant in support of the "Oral History Recording Project" at the Sierra Center		7,500.00

	GRANTS		AMOUNT
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (UCSB) Office of Research Santa Barbara, California 93106		
01/24/11	grant for Prof. Mattanjah S. DeVries, scholar in residence at Educ. Center, Missillac, France Spring semester 2011	$	30,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA College of Letters, Arts and Sciences Slavic Languages and Literatures Los Angeles, California 90089		
02/07/11	grant for Russian Exchange Program - academic year 2010/11		15,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Department of Art History Von KleinSmid Center 351 Los Angeles, California 90089		
02/07/11	grant for Borchard Overseas Dissertation Research Fellowship- academic year 2011/12		25,000.00
	Disbursed to OREGON HEALTH & SCIENCE UNIVERSTIY Deaprtment of Otolaryngology/Head and Neck Surgery 3181 S.W. Sam Jackson Park Rd. Portland, Oregon 97239		
04/24/11	grant for 2011 Oregon Head & Neck Cancer Awareness & Free Screening Day on 05-13-11		3,500.00
	Disbursed to CAL TECH Pasadena, California 91125		
05/11/11	grant for conference on "Visual Saliency" at Education Center, Missillac, France, 07-03 to 07-06-11		35,000.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
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	GRANTS		AMOUNT
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Los Angeles, California 90089		
05/11/11	grant for conference on "Maritime Communities of the Early Modern Atlantic" at Education Center, Missillac, France, 06-26 to 06-29-11	$	35,000.00
	Disbursed to SAN DIEGO STATE UNIVERSITY San Diego, California 92182		
05/11/11	grant for conference on "The Cancer Continuum" at Education Center, Missillac, France, 06-19 to 06-22-11		35,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA 840 West 34th Street, MUS 408D Los Angeles, California 90089		
05/24/11	grant for conference "Recontres de Musique du Chambre" at Education Center 08-15 to 08-20-11		35,000.00
	Disbursed to PET ADOPTION FUND 7515 Deering Avenue Canoga Park, California 91303		
05/24/11	grant to help abused & abandoned animals to be adopted		5,000.00
	Disbursed to SMILE TRAIN 41 Madison Avenue, 28th Floor New York, NY 10010		
05/24/11	grant for 80 children in need of cleft surgeries		20,000.00
	Disbursed to LOS ANGELES MISSION 303 East 5th Street Los Angeles, California 90013		
05/24/11	grant to help feed homeless & hungry in Los Angeles		2,500.00

	GRANTS		AMOUNT
	Disbursed to UNION RESCUE MISSION 545 S. San Pedro Street Los Angeles, California 90013		
05/24/11	grant to provide food & shelter to women & children in Los Angeles	$	2,500.00
	Disbursed to AMERICAN CANCER SOCIETY, GREAT WEST DIVISION 1313 Broadway, Suite 100 Tacoma, WA 98402		
05/24/11	grant for Road to Recovery Program provide 245 cancer patients with prepaid gas cards		25,000.00
	Disbursed to N.S.C.L.C. 1444 Eye Street, NW, Suite 1100 Washington, DC 20005		
05/24/11	grant to partially fund a communications director for one year		30,000.00
	Disbursed to HOUSE EAR INSTITUTE 2100 West Third Street Los Angeles, California 90057		
05/24/11	grant for pediatric hearing research program		10,000.00
	Disbursed to LOS ANGELES REGIONAL FOOD BANK 1734 E. 41st Street Los Angeles, California 90058		
05/24/11	grant for Food Distribution Fund		12,500.00
	Disbursed to PROJECT DIGNITY 12020 Chapman Ave. PMB # 257 Garden Grove, California 92840		
05/24/11	grant in support of programs		2,500.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
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	GRANTS	AMOUNT
	Disbursed to THE MIDNIGHT MISSION 601 South San Pedro Street Los Angeles, California 90014	
05/24/11	grant for 2011 Meal Services program for the Homeless	$ 15,000.00
	Disbursed to WESTSIDE FOOD BANK 1710 22nd Street Santa Monica, California 90404	
05/24/11	grant for purchase of emergency and supplemental food for distribution to local people in need	12,500.00
	Disbursed to MEND 10641 N. San Fernando Road Pacoima, California 91331	
05/24/11	grant to help feed the disadvantaged	5,000.00
	Disbursed to JUNIOR BLIND OF AMERICA 5300 Angeles Vista Boulevard Los Angeles, California 90043	
05/24/11	grant for 15 blind, visually impaired or multi-disabled children to attend Camp Bloomfield in summer 2011	7,500.00
	Disbursed to SUNNY HILLS SERVICES 300 Sunny Hills Drive San Anselmo, California 94960	
05/24/11	grant for mental health services to former foster youth at risk of homelessness	20,000.00
	Disbursed to PLANNED PARENTHOOD LOS ANGELES 400 West 30th Street Los Angeles, California 90007	
05/25/11	grant for education programs in L.A. County	20,000.00

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	GRANTS		AMOUNT
	Disbursed to SOUTHERN CENTER FOR HUMAN RIGHTS 83 Poplar Street, NW Atlanta, GA 30303		
05/25/11	grant for SCHR-SPDTC summer internship program	$	25,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA College of Letters, Arts and Sciences Slavic Languages and Literatures Los Angeles, California 90089		
05/25/11	grant for one-time research position at the IMRC for one academic year (Pasternak collection)		10,000.00
	Disbursed to STETSON UNIVERSITY/COLLEGE OF LAW 1401 61st Street South Gulfport, Florida 33707		
05/25/11	first installment of $50,000 grant for "Distinguished Professorial Lecturer in Elder Law"		25,000.00
	Disbursed to LOS ANGELES MASTER CHORALE 135 North Grand Avenue Los Angeles, California 90012		
05/25/11	grant in support of "Voices Within" program		5,000.00
	Disbursed to REGENTS OF UNIVERSITY OF CALIFORNIA (UC DAVIS) One Shields Avenue Davis, California 95616		
05/25/11	grant for Tomales Bay Workshop conference October 2011 ($13,000 + $12,000)		25,000.00
	Disbursed to SEARCH DOG FOUNDATION 501 East Ojai Avenue Ojai, California 93023		
07/05/11	grant in support of core program		5,000.00

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	GRANTS		AMOUNT
	Disbursed to CSUN 18111 Nordhoff Street Northridge, California 91330-8411		
07/05/11	grant for the purchase of a metabolic system to measure VO2Max, etc.	$	23,588.47
	Disbursed to NATIONAL MULTIPLE SCLEROSIS SOCIETY 2440 S. Sepulveda Boulevard, Suite 115 Los Angeles, California 90064		
07/12/11	grant for educational scholarship program for individuals affected by MS for 2011/2012		7,500.00
	Disbursed to LOS RIOS FOUNDATION 4700 College Oak Drive Sacramento, California 95841		
07/12/11	one time grant for American River College's Creative Writing Summer Colloquia June 2012		20,000.00
	SUB TOTAL:	**$**	**888,088.47**

	GRANTS		AMOUNT
	Borchard Foundation Center on Law and Aging Grants:		
	Disbursed to NATIONAL CONSUMERS LAW CENTER 100 Connecticut Avenue, NW, Suite 510 Washington, DC 20036		
01/03/11	research grant for "Protecting Older Americans' Social Security Benefits from Illegal Service by Banks"	$	20,000.00
	Disbursed to NATIONAL CENTER FOR STATE COURTS 111 2nd Street NE Washington, DC 20002		
1/5/2011	research grant for update/revision of 1993 National Probate Standards		20,000.00
	Disbursed to AMERICAN UNIVERSITY 4801 Massachusetts Avenue, NW Washington, DC 20016		
1/10/2011	research grant for Global and Regional Rights of Older Persons Professor Claudia Martin		20,000.00
	Disbursed to INSTITUTE ON AGING 3575 Geary Blvd. San Francisco, California 94118		
4/25/2011	research grant for "S F Financial Elders Abuse Collaboration" Dr. Erika Falk		20,000.00
	Disbursed to NATIONAL SENIOR CITIZENS LAW CENTER 1444 Eye Street, NW Washington, DC 20005		
6/3/2011	DC office - Summer internship		5,000.00

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	GRANTS		AMOUNT
	Disbursed to LEGAL SERVICES OF NORTHERN CALIFORNIA 515 12th Street Sacramento, California 95814		
6/6/2011	Summer internship at Senior Legal Hotline - Jennifer Anders	$	5,000.00
	Disbursed to UTAH LEGAL SERVICES 205 North 400 West Salt Lake City, Utah 84103		
6/6/2011	Summer internship		5,000.00
	Disbursed to ABA JUSTICE AND EDUCATION FUND 740 15th Street, NW Washington, DC 20005		
6/6/2011	Summer internship		5,000.00
	Disbursed to NATIONAL SENIOR CITIZENS LAW CENTER 1444 Eye Street, NW Washington, DC 20005		
7/20/2011	fellowship for Erin Isaacson for 2011/2012 (12 months)		40,000.00
	Disbursed to CENTER FOR DISABILITY AND ELDER LAW 79W. Monroe Street, Suite 919 Chicago, IL 60603		
7/20/2011	fellowship for Caroline Manley for 2011/2012 (12 months)		40,000.00
	Disbursed to COMMUNITY LEGAL SERVICES 305 S. 2nd Avenue Phoenix, Arizona 85003		
7/20/2011	fellowship for Rebecca Vallas for 2011/2012 (12 months)		40,000.00
	SUB TOTAL:	$	200,000.00
	TOTAL GRANTS:	**$**	**1,088,088.47**