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

OMB No 1545-0052

**2010**Department of the Treasury  
Internal Revenue Service

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

For calendar year 2010, or tax year beginning 10/01, 2010, and ending 9/30, 2011

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

The Atmos Foundation  
P.O. Box 1016  
Orinda, CA 94563

**A** Employer identification number

68-0153116

**B** Telephone number (see the instructions)

925 254-6487

**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, column (c), line 16) **J** Accounting method: ☒ Cash ☐ Accrual  
☐ Other (specify) \_\_\_\_\_

► \$ 2,047,746.

(Part I, column (d) must be on cash basis)

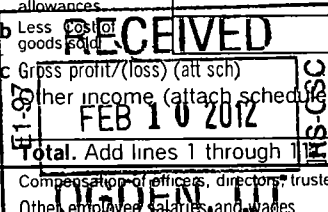
**Part I Analysis of Revenue and Expenses**

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions).)

**(a)** Revenue and expenses per books**(b)** Net investment income**(c)** Adjusted net income**(d)** Disbursements for charitable purposes (cash basis only)**1** Contributions, gifts, grants, etc., received (att sch)**2** Ck ☒ if the foundn is not req to att Sch B**3** Interest on savings and temporary cash investments**4** Dividends and interest from securities**5a** Gross rents**b** Net rental income or (loss)**6a** Net gain/(loss) from sale of assets not on line 10**b** Gross sales price for all assets on line 6a 158,387.**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/(loss) (att sch)**11** Other income (attach schedule)**12** Total. Add lines 1 through 11**13** Compensation of officers, directors, trustees, etc.**14** Other employee salaries and wages**15** Pension plans, employee benefits**16a** Legal fees (attach schedule) See St 1**b** Accounting fees (attach sch) See St 2**c** Other prof fees (attach sch)**17** Interest**18** Taxes (attach schedule)(see instr) See Stm 3**19** Depreciation (attach sch) 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**25** Contributions, gifts, grants paid Stmt 4**26** Total expenses and disbursements. Add lines 24 and 25**27** Subtract line 26 from line 12:**a** Excess of revenue over expenses and disbursements**b** Net investment income (if negative, enter -0-)**c** Adjusted net income (if negative, enter -0-)

SCANNED FEB 15 2012

ADMINISTRATIVE AND OPERATING EXPENSES



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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	282,623.	333,911.	333,911.		
	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 the instructions)					
	7	Other notes and loans receivable (attach sch)					
		Less allowance for doubtful accounts					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments — US and state government obligations (attach schedule) Statement 5		241,000.	241,160.		
	b	Investments — corporate stock (attach schedule) Statement 6	461,077.	424,367.	434,706.		
	c	Investments — corporate bonds (attach schedule) Statement 7	63,702.	30,002.	3,375.		
	11	Investments — land, buildings, and equipment basis					
	Less accumulated depreciation (attach schedule)						
12	Investments — mortgage loans						
13	Investments — other (attach schedule) Statement 8	1,282,741.	990,089.	1,034,594.			
14	Land, buildings, and equipment basis						
	Less accumulated depreciation (attach schedule)						
15	Other assets (describe See Statement 9)	2.	2.				
16	<b>Total assets</b> (to be completed by all filers — see instructions Also, see page 1, item I)	2,090,145.	2,019,371.	2,047,746.			
LIABILITIES	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, & other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe)					
	23	<b>Total liabilities</b> (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. <input checked="" type="checkbox"/>						
	24	Unrestricted	2,090,145.	2,019,371.			
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>						
	27	Capital stock, trust principal, or current funds					
	28	Paid-in or capital surplus, or land, building, and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds					
	30	<b>Total net assets or fund balances</b> (see the instructions)	2,090,145.	2,019,371.			
	31	<b>Total liabilities and net assets/fund balances</b> (see the instructions)	2,090,145.	2,019,371.			

## 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	2,090,145.
2	Enter amount from Part I, line 27a	2	-70,774.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	2,019,371.
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	2,019,371.

**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 shares MLC Company)

(b) How acquired  
P — Purchase  
D — Donation(c) Date acquired  
(month, day, year)(d) Date sold  
(month, day, year)

1a See Statement 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			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;">           If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div>	2	7,432.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px;">           If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0-            in Part I, line 8         </div>	3	962.

**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 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 (column (b) divided by column (c))
2009	115,617.	2,193,165.	0.052717
2008	119,313.	2,200,684.	0.054216
2007	121,000.	2,487,948.	0.048634
2006	127,075.	2,527,108.	0.050285
2005	123,022.	2,463,910.	0.049930

2 Total of line 1, column (d)	2	0.255782
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	0.051156
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	2,156,016.
5 Multiply line 4 by line 3	5	110,293.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	460.
7 Add lines 5 and 6	7	110,753.
8 Enter qualifying distributions from Part XII, line 4	8	109,000.

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

**Part VII Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 — see the instructions)**

1 a. Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary — see instr.)		1	920.
b. Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
c. All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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	920.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		5	920.
6 Credits/Payments			
a. 2010 estimated tax pmts and 2009 overpayment credited to 2010	6 a	930.	
b. Exempt foreign organizations — tax withheld at source	6 b		
c. Tax paid with application for extension of time to file (Form 8868)	6 c		
d. Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7	930.	
8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	10.	
11 Enter the amount of line 10 to be Credited to 2011 estimated tax	11	0.	
		10.	Refunded

**Part VII-A Statements Regarding Activities**

	Yes	No
1 a. During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b. Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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.</i>		X
c. Did the foundation file <b>Form 1120-POL</b> for this year?		X
d. Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e. Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a. Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b. If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a. Enter the states to which the foundation reports or with which it is registered (see 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? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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Form 990-PF (2010)

**Part VII-A: Statements Regarding Activities (Continued)**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>Joyce P. Smail C.P.A.</u> Telephone no <u>510 482-0345</u> Located at <u>1228 Wellington Street, Oakland, CA</u> ZIP + 4 <u>94602</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>	N/A	<input type="checkbox"/>	N/A
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If 'Yes,' enter the name of the foreign country <u></u>	16	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	N/A
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is <b>not</b> 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 the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__ , 20__ , 20__ , 20__</u>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If 'Yes,' did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b	X

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Form 990-PF (2010)

**Part VII** 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 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 instructions)?

5b

N/A

Organizations relying on a current notice regarding disaster assistance check here

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

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

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

6b

X

If 'Yes' to 6b, file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see 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
Dorotea C. Nathan 5 Hidden Lane Orinda, CA 94563	CEO, DIRECTOR 0	0.	0.	0.
Paul Nathan 754 Miner Orinda, CA 94563	CFO, DIRECTOR 0	0.	0.	0.
MARCY NATHAN 754 MINER ROAD ORINDA, CA 94563	Secretary 0	0.	0.	0.
Monica Nathan Via Pantano 8 Milano, 20123 Italy	Director 0	0.	0.	0.

**2** Compensation of five highest-paid employees (other than those included on line 1— see 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

0





**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b> Average monthly fair market value of securities	<b>1a</b>	1,993,689.
<b>b</b> Average of monthly cash balances	<b>1b</b>	195,160.
<b>c</b> Fair market value of all other assets (see instructions)	<b>1c</b>	
<b>d Total</b> (add lines 1a, b, and c)	<b>1d</b>	2,188,849.
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b> Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b> Subtract line 2 from line 1d	<b>3</b>	2,188,849.
<b>4</b> Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	32,833.
<b>5 Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	<b>5</b>	2,156,016.
<b>6 Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	107,801.

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

<b>1</b> Minimum investment return from Part X, line 6	<b>1</b>	107,801.
<b>2a</b> Tax on investment income for 2010 from Part VI, line 5	<b>2a</b>	920.
<b>b</b> Income tax for 2010 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b> Add lines 2a and 2b	<b>2c</b>	920.
<b>3</b> Distributable amount before adjustments Subtract line 2c from line 1	<b>3</b>	106,881.
<b>4</b> Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b> Add lines 3 and 4	<b>5</b>	106,881.
<b>6</b> Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7 Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	<b>7</b>	106,881.

**Part XII** Qualifying Distributions (see instructions)

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b> Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	<b>1a</b>	109,000.
<b>b</b> Program-related investments — total from Part IX-B	<b>1b</b>	
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the		
<b>a</b> Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b> Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4 Qualifying distributions</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	109,000.
<b>5</b> 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 instructions)	<b>5</b>	
<b>6 Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	109,000.

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

**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
<b>1</b> Distributable amount for 2010 from Part XI, line 7				106,881.
<b>2</b> Undistributed income, if any, as of the end of 2010:				
<b>a</b> Enter amount for 2009 only			0.	
<b>b</b> Total for prior years 20 __, 20 __, 20 __		0.		
<b>3</b> Excess distributions carryover, if any, to 2010				
<b>a</b> From 2005	1,782.			
<b>b</b> From 2006	2,570.			
<b>c</b> From 2007				
<b>d</b> From 2008	10,653.			
<b>e</b> From 2009	6,725.			
<b>f</b> Total of lines 3a through e	21,730.			
<b>4</b> Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 109,000.				
<b>a</b> Applied to 2009, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required — see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required — see instructions)	0.			
<b>d</b> Applied to 2010 distributable amount				106,881.
<b>e</b> Remaining amount distributed out of corpus	2,119.			
<b>5</b> Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	23,849.			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b Taxable amount — see instructions.		0.		
<b>e</b> Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
<b>f</b> Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
<b>8</b> Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)	1,782.			
<b>9</b> Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	22,067.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2006	2,570.			
<b>b</b> Excess from 2007				
<b>c</b> Excess from 2008	10,653.			
<b>d</b> Excess from 2009	6,725.			
<b>e</b> Excess from 2010	2,119.			

N/A

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

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

**Part XV** **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> Paid during the year				
<b>Total</b>			<b>3a</b>	
<b>b</b> Approved for future payment				
<b>Total</b>			<b>3b</b>	





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**Statement 1**  
**Form 990-PF, Part I, Line 16a**  
**Legal Fees**

	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
	\$ 1,646.			
Total	\$ 1,646.	\$ 0.	\$ 0.	\$ 0.

**Statement 2**  
**Form 990-PF, Part I, Line 16b**  
**Accounting Fees**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
TAX PREPARATION	\$ 6,070.			
Total	\$ 6,070.	\$ 0.	\$ 0.	\$ 0.

**Statement 3**  
**Form 990-PF, Part I, Line 18**  
**Taxes**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
STATE TAX	\$ 35.			
Total	\$ 35.	\$ 0.	\$ 0.	\$ 0.

**Statement 4**  
**Form 990-PF, Part I, Line 25**  
**Contributions, Gifts, and Grants**

Cash Grants and Allocations

Class of Activity: GENERAL SUPPORT  
 Donee's Name: ISRAEL ENDOWMENT-OSTEOPOROSIS  
 Donee's Address: 41 E. 42ND STREET #607  
 NEW YORK, NY 10017,  
 Relationship of Donee: NONE  
 Organizational Status of Donee: 501(C) 3  
 Amount Given: \$ 5,000.

Class of Activity: GENERAL SUPPORT  
 Donee's Name: SAMARITAN NEIGHBORHOOD  
 Donee's Address: 534 22ND STREET  
 OAKLAND, CA 94612,  
 Relationship of Donee: NONE  
 Organizational Status of Donee: 501(C) 3  
 Amount Given: 10,000.

Class of Activity: GENERAL SUPPORT

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**Statement 4 (continued)**  
**Form 990-PF, Part I, Line 25**  
**Contributions, Gifts, and Grants**

Donee's Name:	ISRAEL ENDOWMENT-ERAN CENTER	
Donee's Address:	41 E. 42ND STREET #607 NEW YORK, NY 10017,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C) 3	
Amount Given:		\$ 5,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	UNITED PARKINSON FOUNDATION	
Donee's Address:	360 W. SUPERIOR STREET CHICAGO, IL 60610,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C) 3	
Amount Given:		10,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	ISRAEL ENDOWMENT-GIRLS TOWN	
Donee's Address:	41 E. 42ND STREET #607 NEW YORK, NY 10017,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C) 3	
Amount Given:		1,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	TUTWILER COMMUNITY EDUCATION CENTER	
Donee's Address:	P.O. BOX 448 TUTWILER, MISS 38963,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C) 3	
Amount Given:		5,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	CHILDREN'S HOSPITAL FOUNDATION	
Donee's Address:	747 FIFTY-SECOND STREET OAKLAND, CA 94609,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C) 3	
Amount Given:		10,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	MARINE MAMMAL CENTER	
Donee's Address:	MARIN HEADLANDS, GGNRA SAUSALITO, CA 94965,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C) 3	
Amount Given:		15,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	ISRAEL ENDOWMENT-YOUTH VILLAGE	
Donee's Address:	41 E. 42ND STREET #607 NEW YORK, NY 10017,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C) 3	
Amount Given:		5,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	DOCTORS WITHOUT BORDERS	



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**Statement 4 (continued)**  
**Form 990-PF, Part I, Line 25**  
**Contributions, Gifts, and Grants**

Donee's Address:	6 EAST 39TH STREET, 8TH FLOOR NEW YORK, NY 10016,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C)3	
Amount Given:		\$ 10,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	COMMUNITY MUSIC CENTER	
Donee's Address:	544 CAPP STREET SAN FRANCISCO, CA 94110,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C)3	
Amount Given:		3,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	ISRAEL GUIDE DOG CENTER FOR THE BLIND	
Donee's Address:	701 EASTON ROAD WARRINGTON, PA 18976,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C)3	
Amount Given:		10,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	SAN FRAN. BOYS & GIRLS CLUB	
Donee's Address:	1950 PAGE STREET SAN FRANCISCO, CA 94117,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(C)3	
Amount Given:		6,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	SUSTAINABLE CONSERVATION	
Donee's Address:	212 SECOND ST., 6TH FLOOR SAN FRANCISCO, CA 94105,	
Relationship of Donee:	NONE	
Organizational Status of Donee:	501(3)C	
Amount Given:		4,000.
Class of Activity:	GENERAL SUPPORT	
Donee's Name:	WOMEN'S AMERICAN ORT FOUNDATION	
Donee's Address:	75 Maiden Lane, 10th Floor New York, NY 10038	
Relationship of Donee:		
Organizational Status of Donee:		
Amount Given:		10,000.

Total \$ 109,000.

**Statement 5**  
**Form 990-PF, Part II, Line 10a**  
**Investments - U.S. and State Government Obligations**

<u>U.S. Government Obligations</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
FEDERAL NAT'T MTG ASSOCIATION NOTE	Cost	\$ 1,000.	\$ 1,003.
FEDERAL HOME LOAN BANKS FIXED COUPON	Cost	100,000.	100,154.
FEDERAL NAT'L MORTGAGE ASSN NOTES	Cost	100,000.	99,927.
FEDERAL HOME LN MTG CALL STEP COUPON	Cost	40,000.	40,076.
		<u>\$ 241,000.</u>	<u>\$ 241,160.</u>
	Total	<u>\$ 241,000.</u>	<u>\$ 241,160.</u>

**Statement 6**  
**Form 990-PF, Part II, Line 10b**  
**Investments - Corporate Stocks**

<u>Corporate Stocks</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
800 CISCO	Cost	\$ 15,040.	\$ 12,400.
500 EXXON MOBILE	Cost	11,809.	36,315.
1500 GENERAL ELECTRIC	Cost	39,084.	22,830.
800 JOHNSON & JOHNSON	Cost	25,799.	50,952.
700 PFIZER	Cost	23,000.	12,376.
400 ABBOTT LABARATORIES	Cost	20,473.	20,456.
160 AMGEN	Cost	9,310.	8,794.
300 FANNIE MAE	Cost	24,759.	72.
1000 MICROSOFT	Cost	27,970.	24,890.
1000 ISHARES TR S&P 500 INDEX	Cost	90,108.	113,690.
1000 ISHARES TR DOWJONES SELECT	Cost	55,029.	48,240.
300 ISHARES TR U S TREAS INFLATION PRO	Cost	30,036.	34,290.
1200 ISHARES TR S&P EUROPE 350	Cost	39,641.	38,244.
25 E-TRADE	Cost	1,028.	228.
200 Yahoo	Cost	3,818.	2,634.
250 ISHARES S&P GLOBAL ENERGY SECTOR	Cost	7,463.	8,295.
	Total	<u>\$ 424,367.</u>	<u>\$ 434,706.</u>

**Statement 7**  
**Form 990-PF, Part II, Line 10c**  
**Investments - Corporate Bonds**

<u>Corporate Bonds</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
25000 LEHMAN BROS HOLDING NOTE	Cost	\$ 30,002.	\$ 3,375.
GENERAL ELEC CAP CORP MTN BE	Cost	0.	0.
	Total	<u>\$ 30,002.</u>	<u>\$ 3,375.</u>

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**Statement 8**  
**Form 990-PF, Part II, Line 13**  
**Investments - Other**

	Valuation Method	Book Value	Fair Market Value
<u>Other Investments</u>			
JOHN HANCOCK LIFE INSURANCE ANNUITY	Cost	\$ 200,000.	\$ 262,012.
CIT BK SALT LAKE CITY 5/14/12	Cost	50,000.	50,763.
HSBC BK 8/21/15	Cost	26,802.	28,418.
HSBC BK 8/28/15	Cost	26,731.	27,253.
HARRIS INTL	Cost	26,666.	26,523.
ALLY BK MIDVALE UTAH	Cost	100,000.	100,154.
GE MONEY BANK 1/17/12	Cost	100,000.	100,262.
UNION BANK 12/23/13	Cost	53,052.	50,095.
UNION BANK 1/27/16	Cost	27,095.	25,465.
UNION BANK 11/24/15	Cost	51,198.	47,716.
UNION BANK 06/27/14	Cost	25,463.	23,891.
UNION BANK 12/29/14	Cost	25,514.	23,798.
UNION BANK 01/31/2017	Cost	51,365.	46,440.
HARRIS NATL ASSN 02/28/17	Cost	75,000.	75,214.
HARRIS NATL ASSN 04/28/17	Cost	101,203.	99,150.
JP MORGAN 09/29/17	Cost	50,000.	47,440.
Total		\$ 990,089.	\$ 1,034,594.

**Statement 9**  
**Form 990-PF, Part II, Line 15**  
**Other Assets**

	Book Value	Fair Market Value
Rounding	\$ 2.	
Total	\$ 2.	\$ 0.

**Statement 10**  
**Form 990-PF, Part IV, Line 1**  
**Capital Gains and Losses for Tax on Investment Income**

Item	(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
1	1000 MORGAN STANLEY PARTNSEC	Purchased	Various	8/22/2011
2	500 MORGAN STANLEY NIKKEI	Purchased	1/01/2003	12/30/2010
3	1000 SAFETY FIRST	Purchased	8/02/2007	11/22/2010
4	OPTIONS	Purchased	Various	Various
5	general electric bond	Purchased	10/01/2009	12/01/2010
6	HSBS BK ZERO COUPON	Purchased	6/25/2009	2/08/2011
7	JP MORGAN CHASE ZERO COUPON	Purchased	5/26/2009	2/08/2011
8	fidelity select money mkt short term gain	Purchased	11/26/2010	11/26/2010
9	fidelity cash reserves short term gain	Purchased	12/17/2010	12/17/2010

**Statement 10 (continued)**  
**Form 990-PF, Part IV, Line 1**  
**Capital Gains and Losses for Tax on Investment Income**

[illegible]