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Form 990-PF

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

OMB No 1545-0052

2011

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 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Name of foundation
LOWELL BERRY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)
3685 Mt Diablo Blvd

Room/suite

City or town, state, and ZIP code
Lafayette, CA 94549

A Employer identification number
94-6108391

B Telephone number (see page 10 of the instructions)
(925) 284-4427

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

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

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

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 22,465,224

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	279	279	279	
	4 Dividends and interest from securities.	506,874	506,874	506,874	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-225,781			
	b Gross sales price for all assets on line 6a _____ 5,367,103				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain			8,204	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	281,372	507,153	515,357	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages	39,129	1,956		37,173
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	12,115	606		11,509
	c Other professional fees (attach schedule)	72	72		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	16,002	2,672		3,339
	19 Depreciation (attach schedule) and depletion	1,216			
	20 Occupancy	33,282	1,664		31,618
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule).	12,290	615		11,663
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	114,106	7,585		95,302
	25 Contributions, gifts, grants paid	1,293,333			1,293,333
	26 Total expenses and disbursements. Add lines 24 and 25	1,407,439	7,585		1,388,635
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-1,126,067			
	b Net investment income (if negative, enter -0-)		499,568		
	c Adjusted net income (if negative, enter -0-)			515,357	

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	50	50	50
	2	Savings and temporary cash investments	368,101	715,436	715,436
	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) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges		14,009	14,009
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	24,087,021	21,734,235	21,734,235
	14	Land, buildings, and equipment basis ▶ 64,316 Less accumulated depreciation (attach schedule) ▶ 62,822	2,710	1,494	1,494
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	24,457,882	22,465,224	22,465,224	
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 ▶ _____)	6,562	1,767	
	23	Total liabilities (add lines 17 through 22)	6,562	1,767	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	24,451,320	22,463,457	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	24,451,320	22,463,457	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	24,457,882	22,465,224	

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 24,451,320
2	Enter amount from Part I, line 27a	2 -1,126,067
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	4 23,325,253
5	Decreases not included in line 2 (itemize) ▶ _____	5 861,796
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 22,463,457

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)
1 a	Vanguard Group 2011 STCG dividends	P	2011-01-01	2011-12-31
b	Vanguard Group 2011 LTCG dividends	P	2009-06-30	2011-12-31
c	Vanguard Group 2011 transfers	P	2009-06-30	2011-12-31
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 8,204			8,204
b 12,385			12,385
c 5,346,514		5,592,884	-246,370
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			8,204
b			12,385
c			-246,370
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	-225,781
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	8,204

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))
2010	1,393,589	22,669,291	0 06148
2009	1,198,055	20,099,380	0 05961
2008	1,563,102	23,465,767	0 06661
2007	1,582,668	27,848,460	0 05683
2006	1,602,058	26,341,876	0 06082

2 Total of line 1, column (d).	2	0 30534
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 06107
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	23,641,609
5 Multiply line 4 by line 3.	5	1,443,769
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	4,996
7 Add lines 5 and 6.	7	1,448,765
8 Enter qualifying distributions from Part XII, line 4.	8	1,388,635

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 VIExcise 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 <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b		1	9,991
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	9,991
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	9,991
6		Credits/Payments			
a		2011 estimated tax payments and 2010 overpayment credited to 2011	6a	24,000	
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	24,000
8		Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	14,009
11		Enter the amount of line 10 to be Credited to 2012 estimated tax 14,009	Refunded	11	

Part VII-AStatements Regarding Activities

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?		Yes	No
		1a		No
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)?			No
	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		No
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?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	• By language in the governing instrument, or			
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) CA _____			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of Gary DePolo Telephone no (925) 284-4427 Located at 3685 Mt Diablo Blvd 269 Lafayette CA ZIP +4 94549			
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.			
16	At any time during calendar year 2011, 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?	15		
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country	16	Yes	No

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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
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 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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 2011?	1c		No
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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? 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 20 of the instructions).	2b		No
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?			
b	If "Yes," did it have excess business holdings in 2011 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 2011.).	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2011?	4b		No

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))?

YesNo

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

YesNo

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

YesNo

(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).

YesNo

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

YesNo

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)? Organizations relying on a current notice regarding disaster assistance check here.

YesNo

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

YesNo

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

YesNo

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.

YesNo

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

YesNo

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

YesNo

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 Additional Data Table				

2

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

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

Total

number of other employees paid over \$50,000.

Part VIII

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

Part IX-A Summary of Direct Charitable Activities

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

1	THE FOUNDATION HAS ONE CHARITABLE ACTIVITY (SEE EXPLANATION IN PART XVI-B)	0
2		
3		
4		

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

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	23,589,728
b	Average of monthly cash balances.	1b	411,905
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	24,001,633
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	
3	Subtract line 2 from line 1d.	3	24,001,633
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	360,024
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	23,641,609
6	Minimum investment return. Enter 5% of line 5.	6	1,182,080

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	1,182,080
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	9,991
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	9,991
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,172,089
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,172,089
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,172,089

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	1,388,635
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,388,635
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,388,635
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 2010	(c) 2010	(d) 2011
1	Distributable amount for 2011 from Part XI, line 7				1,172,089
2	Undistributed income, if any, as of the end of 2011				
a	Enter amount for 2010 only.				
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2011				
a	From 2006.				304,498
b	From 2007.				223,950
c	From 2008.				430,900
d	From 2009.				206,903
e	From 2010.				281,132
f	Total of lines 3a through e.	1,447,383			
4	Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 1,388,635				
a	Applied to 2010, 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). . .	0			
d	Applied to 2011 distributable amount.				1,172,089
e	Remaining amount distributed out of corpus	216,546			
5	Excess distributions carryover applied to 2011 (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	1,663,929			
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 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f	Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011.				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).				
8	Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions).	304,498			
9	Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a.	1,359,431			
10	Analysis of line 9				
a	Excess from 2007.				223,950
b	Excess from 2008.				430,900
c	Excess from 2009.				206,903
d	Excess from 2010.				281,132
e	Excess from 2011.				216,546

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 2011, enter the date of the ruling.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2011	(b) 2010	(c) 2009	(d) 2008	
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 organization had \$5,000 or more in assets at any time during the year—see page 27 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))

b

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

2

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

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

a

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

The Lowell Berry Foundation
3685 Mt Diablo Blvd Ste 269
Lafayette, CA 94549

b

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

There is no standard request form required by the foundation. All applications for grant requests are submitted on applicant's form or letterhead.

c

Any submission deadlines

No deadline date required

d

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

Only restriction is that the applicant must be located in the State of California counties of Alameda or Contra Costa.

Form 990-PF (2011)

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)				
a Paid during the year See Additional Data Table				
Total			3a	1,293,333
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments.					
3	Interest on savings and temporary cash investments					279
4	Dividends and interest from securities.					506,874
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					-225,781
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).					281,372
13	Total. Add line 12, columns (b), (d), and (e). 13					281,372

(See worksheet in line 13 instructions on page 28 to verify calculations)

[illegible]

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?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.			No
(2) Other assets.			No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.			No
(2) Purchases of assets from a noncharitable exempt organization.			No
(3) Rental of facilities, equipment, or other assets.			No
(4) Reimbursement arrangements.			No
(5) Loans or loan guarantees.			No
(6) Performance of services or membership or fundraising solicitations.			No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.			No
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			

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
--------------------------	--------------------------	---------------------------------

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Additional Data

Software ID: 11000144
Software Version: 2011v1.2
EIN: 94-6108391
Name: LOWELL BERRY FOUNDATION

Form 990PF - Special Condition Description:

Special Condition Description

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANNETTE S ROBISON	Director 2 00	0		
3154 Lucas Drive Lafayette, CA 94549				
JAYNE S MORDELL	Director 1 00	0		
40 Palmer Lane Portola Valley, CA 94028				
JOHN ASHER	DIRECTOR 3 00	0		
3175 Walnut Blvd Walnut Creek, CA 94596				
JAMI S KANE	Director 2 00	0		
314 Las Quebradas Lane Alamo, CA 94507				
GARY L DEPOLO	Treasurer 5 00	0		
37 CHARLES HILL CIRCLE ORINDA, CA 94563				
PATRICIA B CONKLIN	Vice President 4 00	0		
2361 BAY VIEW AVENUE CARMEL, CA 93921				
BARBARA B CORNEILLE	Secretary 3 00	0		
112 LARK COURT ALAMO, CA 94507				
LARRY R LANGDON	PRESIDENT 1 00	0		
137 ASH LANE PORTOLA VALLEY, CA 94028				

Form 990PF Part XV Line 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)				
a Paid during the year				
Young Life - Berkeley2407 Dana St Berkeley, CA 94704	Charitable	501(c)3	General support	12,500
WCC Salesian Boys & Girls ClubPO Box 6120 San Pablo, CA 94806	Charitable	501(c)3	Summer Enrich Program	4,000
Valley Crisis Pregnancy Center7660 Amador Valley Blvd Ste D Dublin, CA 94568	Charitable	501(c)3	General support	2,000
UC Regent2080 Addison St 4200 Oakland, CA 94720	Charitable	501(c)3	Memory of RJA	500
Tri-Valley Baseball Academy3574 Ovilla Way Pleasanton, CA 94566	Charitable	501(c)3	General support	3,000
The Tahoe FundPO Box 7124 Tahoe City, CA 96145	Charitable	501(c)3	General support	600
The Stride Center1212 Broadway Ste 400 Oakland, CA 94612	Charitable	501(c)3	General support	4,000
Stepping Stones Growth Center311 MacArthur Blvd San Leandro, CA 94577	Charitable	501(c)3	Summer Park Prog	750
Senior Helpline Services1035A Carol Lane Lafayette, CA 94549	Charitable	501(c)3	General support	2,000
Second Harvest Food Bank750 Curtner Ave San Jose, CA 95125	Charitable	501(c)3	General support	500
St Marys Center925 Brockhurst St Oakland, CA 94608	Charitable	501(c)3	Winter Shelter Prog	2,000
Saint Elizabeth High School1530 - 34th Ave Oakland, CA 94601	Charitable	501(c)3	Day of Service Prog	4,983
Saint Elizabeth Elementary School1516 - 33rd Ave Oakland, CA 94601	Charitable	501(c)3	General support	3,000
Royal Family Kids Camp4725 Evora Road Concord, CA 94520	Charitable	501(c)3	Camperships	5,000
Q PlacePO Box 1581 Wheaton, IL 60187	Charitable	501(c)3	Oakland Ministry	5,000
Project Avary384 Bel Marin Keys Blvd Ste G Novato, CA 94949	Charitable	501(c)3	General support	2,000
Pacific Tigers Athletics Assoc3601 Pacific Ave Stockton, CA 95211	Charitable	501(c)3	Women's Soccer	5,000
Pacheco MTZ Homeless Outreach2161 Pomona Ave Martinez, CA 94553	Charitable	501(c)3	General support	1,500
Opportunity Junction Inc3102 Delta Fair Blvd Antioch, CA 94509	Charitable	501(c)3	General support	3,000
Oak Park Christian Center2073 Oak Park Blvd Pleasant Hill, CA 94523	Charitable	501(c)3	C Asher - Mission	1,000
Next Step Learning Center222 Curtis St Oakland, CA 94607	Charitable	501(c)3	General support	4,000
Navy Seals Warrior Fund Inc181 Hudson St New York, NY 10013	Charitable	501(c)3	General support	1,000
My New Red Shoes111 Anza Blvd Burlingame, CA 94010	Charitable	501(c)3	General support	3,500
Mt Hermon Association IncPO Box 413 Mt Hermon, CA 95041	Charitable	501(c)3	Camperships	3,000
Monterey Bay Aquarium886 Cannery Row Monterey, CA 93940	Charitable	501(c)3	General support	1,000
Mindful Schools1944 Embarcadero East Oakland, CA 94606	Charitable	501(c)3	General support	3,600
The Mentoring Center672 - 13rh St Ste 200 Oakland, CA 94612	Charitable	501(c)3	Trans Girls Gp Prog	1,000
Love-A-Child Missions2301 Willow Pass Rd Bay Point, CA 94565	Charitable	501(c)3	General support	4,000
Living Dream Arts4198 - 2nd Ave 303 San Francisco, CA 94118	Charitable	501(c)3	After School Arts	2,000
Lindsay Wildlife Museum1931 First Ave Walnut Creek, CA 94596	Charitable	501(c)3	Interpretive Guide	4,000

Form 990PF Part XV Line 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)				
a Paid during the year				
Lincoln Child Center4368 Lincoln Ave Oakland,CA 94602	Charitable	501(c)3	Quest Program	2,500
Juvenile Diabetes Res Fnd Intl120 Wall St New York,NY 10005	Charitable	501(c)3	General support	3,235
Jewish Commuity Foundation300 Grand Ave Oakland,CA 94610	Charitable	501(c)3	General support	1,000
Hope 4 the Heart22035 Meekland Ave Hayward,CA 94541	Charitable	501(c)3	General Support	4,000
Holy Names University3500 Mountain Blvd Oakland,CA 94619	Charitable	501(c)3	Visiting Sisters Program	6,000
Girls Inc of Alameda County13666 E 14th St San Leandro,CA 94578	Charitable	501(c)3	General support	1,000
Game Theory Academy337 - 17th St 101 Oakland,CA 94612	Charitable	501(c)3	General support	2,000
Family Support Services of the Bay Area401 Grand Ave Oakland,CA 94610	Charitable	501(c)3	OreMi Mentor Program	5,000
Family Service of the Tri-Cities39217 Liberty St B-10 Fremont,CA 94538	Charitable	501(c)3	General support	2,000
Family Aid - Catholic Education2121 Harrison St Oakland,CA 94612	Charitable	501(c)3	General support	10,000
ETM - Bay Area299 Precita Ave San Francisco,CA 94110	Charitable	501(c)3	School Music West	1,500
Down Syndrome Connection101-J Town Country Dr Danville,CA 94526	Charitable	501(c)3	General support	2,000
Diablo Regional Arts Association1601 Civic Drive Walnut Creek,CA 94596	Charitable	501(c)3	General support	1,500
Concord Comm Econ Dev Org2699 Monument Blvd Ste G Concord,CA 94520	Charitable	501(c)3	General support	3,000
Community Initiatives354 Pine St Ste 700 San Francisco,CA 94104	Charitable	501(c)3	Visual Arts/Language	3,500
City Team Ministries San Jose2304 Zanker Rd San Jose,CA 95131	Charitable	501(c)3	General support	2,500
Childrens Vision First1007 General Kennedy Ave San Francisco,CA 94129	Charitable	501(c)3	General support	2,000
CC Interfaith Transitional Housing535 Main St Ste 209 Martinez,CA 94553	Charitable	501(c)3	General support	3,000
Cantare Con VivoPO Box 21127 Oakland,CA 94620	Charitable	501(c)3	Children's Choir	2,500
California Symphony Orchestra877 Ygnacio Valley Rd 200 Walnut Creek,CA 94596	Charitable	501(c)3	Music in Schools	2,000
California Ctr for Cooperative Dev979 F Street Ste A-1 Davis,CA 95616	Charitable	501(c)3	Richmond Workers	1,000
Boys & Girls Clubs of the Diablo Valley1301 Alhambra Ave Martinez,CA 94553	Charitable	501(c)3	General support	5,000
Berkeley Youth Living with Disabilities2110 - 7th St Berkeley,CA 64710	Charitable	501(c)3	Outside Excursions	1,500
Bay Area Community Resources171 Carlos Drive San Rafael,CA 94903	Charitable	501(c)3	Willard Youth Prog	4,000
An Episcopal Ministry to Covn Hosp1700 Santa Clara Ave Alameda,CA 94501	Charitable	501(c)3	Program expansion	2,500
Womens Initiative for Self Employment519 - 17th Street Ste 110 Oakland,CA 94612	Charitable	501(c)3	Success Link Program	3,000
Women on the Way Recovery Center20424 Haviland Ave Hayward,CA 94541	Charitable	501(c)3	General Support	4,000
Treasure Island Sailing Ctr Fnd698 California Ave Bldg 112 San Francisco,CA 94130	Charitable	501(c)3	Camperships	2,500
SOAR for YouthPO Box 1291 Berkeley,CA 94701	Charitable	501(c)3	General support	5,000
The Salvation Army660 Veterans Blvd Redwood City,CA 94063	Charitable	501(c)3	General Support	1,500

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
The Salvation ArmyPO Box 1884 Monterey, CA 93942	Charitable	501(c)3	General Support	1,000
Saint Edward School5788 Thornton Ave Newark, CA 94560	Charitable	501(c)3	Special Needs Prog	3,000
Oakland Digital Arts & Literacy Center1224 Harrison St Oakland, CA 94612	Charitable	501(c)3	General Support	2,500
Northern California Family Center2244 Pacheco Blvd Martinez, CA 94553	Charitable	501(c)3	General Support	3,000
Loved Twice4245 College Ave Ste 803 Oakland, CA 94618	Charitable	501(c)3	General Support	5,000
League of Volunteers of Newark36120 Ruschin Drive Newark, CA 94560	Charitable	501(c)3	Summer Park Program	2,500
John Ernest FoundationPO Box 60225 Palo Alto, CA 94306	Charitable	501(c)3	General Support	1,000
The Independent Institute100 Swan Way Oakland, CA 94621	Charitable	501(c)3	Scholar Voucher	5,000
Habitot Childrens Museum2065 Kittridge St Berkeley, CA 94704	Charitable	501(c)3	General Support	2,000
Grace Lutheran Church2369 Barrett Ave Richmond, CA 94804	Charitable	501(c)3	Choir/Music Prog	2,500
First Presbyterian Church of Fresno1540 M Street Fresno, CA 93721	Charitable	501(c)3	J Evans Family Fund	2,000
Cornerstone Comm Dev Corp1395 Bancroft Ave San Leandro, CA 94577	Charitable	501(c)3	General Support	3,000
Community Resources for Science1611 San Pablo Ave Ste 108 Berkeley, CA 94702	Charitable	501(c)3	General Support	3,000
Clausen House Inc88 Vernon St Oakland, CA 94610	Charitable	501(c)3	Indep living services	3,000
Child Abuse Prevention Council of CC1410 Danzig Plaza Ste 110 Concord, CA 94520	Charitable	501(c)3	Newborn Connection	3,000
Bread of Life EPAPPO Box 52070 East Palo Alto, CA 94303	Charitable	501(c)3	General Support	1,000
Boy Scouts of America Council1001 Davis St San Leandro, CA 94577	Charitable	501(c)3	Camperships	4,000
Alameda Boys & Girls ClubPO Box 1069 Alameda, CA 94501	Charitable	501(c)3	Power hour program	4,000
American Red CrossPO Box 4002018 Des Mones, IA 50340	Charitable	501(c)3	Japan Earthquake	1,000
Wardrobe for Oportunity570 14th St Ste 5 Oakland, CA 94512	Charitable	501(c)3	General Support	5,000
Walnut Creek Education Foundation960 Ygnacio Valley Rd Walnut Creek, CA 94596	Charitable	501(c)3	General Support	1,000
Super Stars Literacy Inc675 Hegenburger Rd Ste 250 Oakland, CA 94621	Charitable	501(c)3	General Support	4,000
Stanford Univ - Dept of Athletics326 Galvez Street Stanford, CA 94305	Charitable	501(c)3	Various programs	20,000
San Ramon Valley Ed FndAlamoStone100 Wilson Rd Alamo, CA 94507	Charitable	501(c)3	General support	1,265
San Francisco Ballet Assoc455 Franklin St San Francisco, CA 94102	Charitable	501(c)3	General Support	750
PTA CA Congress of PTA561 Merriewood Dr Lafayette, CA 94549	Charitable	501(c)3	General Support	2,000
Peninsula Ball FoundationPO Box 1032 Menlo Park, CA 94026	Charitable	501(c)3	General Support	500
Oakland Youth Chorus2501 Harrison St Oakland, CA 94612	Charitable	501(c)3	General support	2,000
John Muir Health Foundation1400 Treat Blvd Ste 30 Walnut Creek, CA 94597	Charitable	501(c)3	Caring Hands	2,000
Hispanic Ministry Center Inc2321 East 4th St Ste C607 Santa Ana, CA 92705	Charitable	501(c)3	UYWI - RELOAD	5,000

Form 990PF Part XV Line 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)				
a Paid during the year				
Family Emergency Shelter Coalition 21455 Birch St 5 Hayward,CA 94541	Charitable	501(c)3	General Support	5,000
Court Appointed Spec Repres Program2020 North Broadway Ste 204 Walnut Creek,CA 94596	Charitable	501(c)3	General Support	5,000
Contra Costa Kops for Kids1430 Willow Pass Rd 130 Concord,CA 94520	Charitable	501(c)3	General Support	2,000
Center for the Ed of Infant Deaf1035 Grayson St Berkeley,CA 94710	Charitable	501(c)3	General support	2,000
Carmel FoundationPO Box 1050 Carmel,CA 93921	Charitable	501(c)3	General Support	500
Carmel-by-the-Sea Public Library FoundPO Box 2042 Carmel,CA 93921	Charitable	501(c)3	General Support	1,000
California Assoc of Student Council 1212 Preservation Park Way Oakland,CA 94612	Charitable	501(c)3	Leadership School	3,000
Wounded Warrior Project WWP7020 ACSkinner Pkwy Ste 100 Jacksonville,FL 32256	Charitable	501(c)3	In Memory of GE	500
WellSpringPO Box 7384 Menlo Park,CA 94026	Charitable	501(c)3	Various programs	7,000
Walnut Creek Presbyterian Church 1801 Lacassie Ave Walnut Creek,CA 94596	Charitable	501(c)3	Various programs	23,000
Stanford School of Medicine2700 San Hill Rd Stanford,CA 94025	Charitable	501(c)3	Women's Cancer/Mood Disorder	7,150
Stanford University Medical Ctr326 Galvez St Stanford,CA 94305	Charitable	501(c)3	Mood disorder	3,000
St Stephens Episcopal Church66 St Stephens Dr Orinda,CA 94563	Charitable	501(c)3	General Support	5,300
San Ramon Valley ThunderbirdsPO Box 490 San Ramon,CA 94583	Charitable	501(c)3	General Support	10,000
San Francisco SymphonyDavies Symphony Hall San Francisco,CA 94102	Charitable	501(c)3	General Support/School Music Prog	1,250
Punahou School1601 Puahou St Honolulu,HI 96822	Charitable	501(c)3	General Support	1,000
Monterey County Symphony Assoc PO Box 3965 Carmel,CA 93921	Charitable	501(c)3	General Support	3,000
Lafayette Arts & Science FoundPO Box 923 Lafayette,CA 94549	Charitable	501(c)3	General Support	5,000
Junior League of Monterey County 391 Decatur St Monterey,CA 93940	Charitable	501(c)3	General Support	500
The Hoover Institution326 Galvez St Stanford,CA 94305	Charitable	501(c)3	General Support	3,000
CU-Boulder Alumni Scholarship Fund4740 Walnut St Boulder,CO 80301	Charitable	501(c)3	General Support	100
Community Hospital Foundation 1000 Munras Ave Ste 200 Monterey,CA 94940	Charitable	501(c)3	General Support	1,000
Childrens Hospital & Research Center2201 Broadway Ste 600 Oakland,CA 94612	Charitable	501(c)3	General Support	100
Character Choice Inc1545 Tanaka Dr Erie,CO 80516	Charitable	501(c)3	General Support	2,000
Bayshore Christian Ministries1001 Beech St East Palo Alto,CA 94303	Charitable	501(c)3	General Support	2,500
All Saints Episcopal ChurchPO Box 1296 Carmel,CA 93921	Charitable	501(c)3	General Support	3,000
VESTIA400 Ellinwood Way Pleasant Hill,CA 94523	Charitable	501(c)3	Camperships	6,000
Trips for Kids Marin138 Sunnyside Mill Valley,CA 94941	Charitable	501(c)3	General Support/Bikes for Tots	4,500
Todays Youth Matter461 Valley Way Milpitas,CA 95035	Charitable	501(c)3	General support	4,000
Tides Center The PresidioPO Box 29907 San Francisco,CA 94129	Charitable	501(c)3	Boost! West Oakland	3,000

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
Taylor Family Foundation5555 Arroyo Rd Livermore,CA 94550	Charitable	501(c)3	General support	5,500
Stagebridge2501 Harrison St Oakland,CA 94612	Charitable	501(c)3	General Support	1,500
Shelter Inc of Contra Costa County1815 Arnold Dr Martinez,CA 94553	Charitable	501(c)3	General Support	4,000
Samaritan Neighborhood Center534 - 22nd St Oakland,CA 94612	Charitable	501(c)3	General support	5,000
The Salvation Army379 12th St Oakland,CA 94612	Charitable	501(c)3	Christmas food	4,500
St Vincent de Paul - Contra Costa Cnty2210 Gladstone Dr Pittsburg,CA 94565	Charitable	501(c)3	General support	5,000
St Marys CollegePO Box 4300 Moraga,CA 94575	Charitable	501(c)3	Vern Oswald Scholarship	2,500
Regional Parks FoundationPO Box 21074 Oakland,CA 94620	Charitable	501(c)3	Camperships	5,000
Prescott-Joseph Center920 Peralta St Oakland,CA 94607	Charitable	501(c)3	After School Music Program	2,000
Okizu Foundation16 Digital Dr Novato,CA 94949	Charitable	501(c)3	General support	5,000
Monument Crisis Center2350 Monument Blvd Ste B Concord,CA 94520	Charitable	501(c)3	Various programs	5,500
Loaves & Fishes of Contra Costa1985 Bonifacio St Ste 100 Concord,CA 94520	Charitable	501(c)3	General Support	3,000
Lighthouse for the Blind214 Van Ness Ave San Francisco,CA 94102	Charitable	501(c)3	Camperships	1,000
Kidpower Teenpower FullpowerPO Box 2163 Castro Valley,CA 94546	Charitable	501(c)3	General Support	1,500
Junior Center of Art and Science558 Bellevue Ave Oakland,CA 94610	Charitable	501(c)3	Camperships	2,000
JFK University100 Ellinwood Way Pleasant Hill,CA 94523	Charitable	501(c)3	Camperships	3,000
Interfaith Council of CC County1543 Sunnyvale Ave Walnut Creek,CA 94597	Charitable	501(c)3	Winter Nights Program	6,000
Girl Scouts of No California7700 Edgewater Dr Ste 340 Oakland,CA 94621	Charitable	501(c)3	Camperships	2,000
Friends of Oakland Parks & Recreation11450 Golf Links Road Oakland,CA 94605	Charitable	501(c)3	Ace Kids Golf Program	4,000
The Foundation Center312 Sutter St Ste 606 San Francisco,CA 94108	Charitable	501(c)3	General Support	1,000
Family Paths Inc1727 Martin Luther King Jr Wy Oakland,CA 94612	Charitable	501(c)3	Child Trama Proj	2,000
Community Alliance for LearningPO Box 6098 Albany,CA 94706	Charitable	501(c)3	Writer Coach	2,500
Catholic Charities of the Diocese433 Jefferson St Oakland,CA 94607	Charitable	501(c)3	General Support	7,000
Camps in CommonPO Box 11061 Oakland,CA 94611	Charitable	501(c)3	Camperships	3,500
Bread Project1555 Park Ave Unit B Emeryville,CA 94608	Charitable	501(c)3	General Support	6,000
Boy Scouts of America800 Ellinwood Way Pleasant Hill,CA 94523	Charitable	501(c)3	Camperships	4,000
Boys & Girls Club - Oakland3300 High St Oakland,CA 94619	Charitable	501(c)3	Camperships/Gen'l Supp	5,000
Bay Area Parent Leadership Action405 - 14th St Ste 811 Oakland,CA 94612	Charitable	501(c)3	Parents Ready	2,000
Ariel Outreach MissionPO Box 5035 Oakland,CA 94605	Charitable	501(c)3	Gen'l Supp/Emerg Grant	6,500
Alameda County Meals on Wheels6955 Foothill Blvd Oakland,CA 94605	Charitable	501(c)3	Senior Holiday Gifts	2,500

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
Alameda County Library Foundation 2450 Stevenson Blvd Fremont, CA 94538	Charitable	501(c)3	Homework Club	5,000
Young Life - Diablo Valley2363 Boulevard Circle Ste 102 Walnut Creek, CA 94595	Charitable	501(c)3	General Support/Camperships	32,500
Young Life of ConcordPO Box 563 Concord, CA 94522	Charitable	501(c)3	General Support/Camperships	12,000
School of Urban MissionsPO Box 14145 Oakland, CA 94614	Charitable	501(c)3	Various programs	147,500
Prison Fellowship Ministries44180 Riverside Pkwy Lansdowne, VA 20176	Charitable	501(c)3	Angel Tree	25,000
Patten University2433 Coolidge Ave Oakland, CA 94601	Charitable	501(c)3	Praxis Scholarships	15,000
New College Adv Christian Studies 2029 Durant Ave Berkeley, CA 94704	Charitable	501(c)3	Spirituality Curriculum	7,500
The Leadership Connection1717 N California Blvd Ste 3D Walnut Creek, CA 94596	Charitable	501(c)3	General Support	75,000
Joni & Friends - SF Bay Area3553 Castro Valley Blvd Castro Valley, CA 94546	Charitable	501(c)3	Various programs	30,000
InterVarsity Christian Fellowship 32802 Matthew Dr Dana Point, CA 92629	Charitable	501(c)3	Multiple Ministries	31,000
Hawaiian Islands MinistriesPO Box 777 Honolulu, HI 96808	Charitable	501(c)3	General Ministry	30,000
Harbor House Ministries Inc1811 - 11th Ave Oakland, CA 94606	Charitable	501(c)3	General Support	30,000
Fuller Theological Seminary135 North Oakland Ave Pasadena, CA 91182	Charitable	501(c)3	Various Programs	120,000
Faith Network of the East Bay Inc 2633 Telegraph Ave 409 Oakland, CA 94612	Charitable	501(c)3	General Support	30,000
City Team MinistriesPO Box 23833 Oakland, CA 94623	Charitable	501(c)3	General Support	40,000
Campus Crusade for Christ1922 Grant St Apt 5 Berkeley, CA 94703	Charitable	501(c)3	Leadership Institute	10,500
The Bay Area Urban Network745 - 105th Ave Oakland, CA 94603	Charitable	501(c)3	Various programs	133,250
Bay Area Rescue Mission2114 Macdonald Ave Richmond, CA 94802	Charitable	501(c)3	General Support	20,000
Total ▶ 3a				1,293,333

TY 2011 Accounting Fees Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Harrison Accounting Group	12,115	606	0	11,509

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2011 Depreciation Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 11000144

Software Version: 2011v1.2

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Dell computer	2007-01-09	1,290	903	54	20 00 %	258			
Oil Portraits	2006-10-27	2,701	1,592	58	14 29 %	386			
Oil Portraits	2006-03-28	4,000	2,786	58	14 29 %	572			

TY 2011 Investments - Other Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 11000144

Software Version: 2011v1.2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
American Funds	FMV	827,398	827,398
Vanguard Group	FMV	20,906,837	20,906,837

TY 2011 Land, Etc. Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 11000144

Software Version: 2011v1.2

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	64,316	62,822	1,494	1,494

TY 2011 Other Decreases Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 11000144

Software Version: 2011v1.2

Description	Amount
Change in unrealized gain in invest.	861,796

TY 2011 Other Expenses Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 11000144

Software Version: 2011v1.2

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Telephone	1,913	96		1,817
Repairs & maintenance	119	6		113
Penalty	12			
Office supplies	2,938	147		2,791
Insurance	7,046	352		6,694
Event expense	250	13		237
Bank charges	12	1		11

TY 2011 Other Liabilities Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 11000144**Software Version:** 2011v1.2

Description	Beginning of Year - Book Value	End of Year - Book Value
Federal excise tax	5,054	
Payroll tax payable	1,508	1,767

TY 2011 Other Professional Fees Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Portfolio managment fees	72	72	0	0

TY 2011 Taxes Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 11000144**Software Version:** 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
State Form 199 fee	10	1		9
RRF-1 & Secty of State fee	150	8		142
Personal property taxes	138	7		131
Payroll taxes	3,218	161		3,057
Foreign tax on dividends	2,495	2,495		
Excise tax on investment	9,991			