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Form 990-PF

Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

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

2011

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

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.)

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

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)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check <input type="checkbox"/> <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				
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	1,767
23	Total liabilities (add lines 17 through 22)	6,562	1,767	1,767
Net Assets or Fund Balances				
24	Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.	24,451,320	22,463,457	
25	Unrestricted			
26	Temporarily restricted			
	Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/> and complete lines 27 through 31.			
27	Permanently restricted			
28	Capital stock, trust principal, or current funds			
29	Paid-in or capital surplus, or land, bldg, and equipment fund			
30	Retained earnings, accumulated income, endowment, or other funds			
	Total net assets or fund balances (see page 17 of the instructions)	24,451,320	22,463,457	22,463,457
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	24,457,882	22,465,224	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 VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	9,991
	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			
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 type="checkbox"/> if Form 2220 is attached <input checked="" type="checkbox"/>	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 <input type="checkbox"/> 14,009 Refunded <input type="checkbox"/>	11		

Part VII-A Statements 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
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		Yes	No
	<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>			
1c	Did the foundation file Form 1120-POL for this year?		Yes	No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		Yes	No
	<i>If "Yes," attach a detailed description of the activities.</i>			
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>		Yes	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		Yes	No
b	If "Yes," has it filed a tax return on Form 990-T for this year?		Yes	No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		Yes	No
	<i>If "Yes," attach the statement required by General Instruction T.</i>			
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?		Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>		Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input type="checkbox"/> CA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>		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)? <i>If "Yes," complete Part XIV</i>		Yes	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		Yes	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?	13	Yes	
Website address ► N/A				
14	The books are in care of ► Gary DePolo Located at ► 3685 Mt Diablo Blvd 269 Lafayette CA	Telephone no ► (925) 284-4427 ZIP +4 ► 94549		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ►	15		
16	and enter the amount of tax-exempt interest received or accrued during the year	16	Yes	No
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?				
See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ►				

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	□ Yes	✓ No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	□ Yes	✓ No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	□ Yes	✓ No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	□ Yes	✓ No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	□ Yes	✓ No
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	□ Yes	✓ No
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b	No
c	Organizations relying on a current notice regarding disaster assistance check here. ►		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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?	2a	
	► If "Yes," list the years ► 20____, 20____, 20____, 20____	2b	
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?	3a	
	► 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))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/> Yes	5b	No
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If "Yes," attach the statement required by Regulations section 53.4945-5(d).</i>		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>		
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b	No
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		

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.				<input type="checkbox"/> Yes

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 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	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3.	▶

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	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	3a	
a	Suitability test (prior IRS approval required).	3b	
b	Cash distribution test (attach the required schedule).	4	1,388,635
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	5	
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).	6	1,388,635
6	Adjusted qualifying distributions. Subtract line 5 from line 4.		

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:	1,663,929			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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. <input type="text"/>			
2a	Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 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.			
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

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	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)
348& 1	THE LOWELL BERRY FOUNDATION IS PRIMARILY SUPPORTED BY INVESTMENT INCOME CONSISTING OF INTEREST, DIVIDENDS, AND CAPITAL GAINS THE PURPOSE OF THE FOUNDATION IS TO DISTRIBUTE ITS INCOME IN A MANNER THAT WILL HELP PRESERVE THE CHRISTIAN TRADITION AND ASSIST LOCAL CHARITABLE ORGANIZATIONS WHICH HAVE PROVEN EFFECTIVE IN THEIR ASSISTANCE TO THE NEEDY SEGMENTS OF SOCIETY THROUGH EARNING INCOME FROM ITS VARIOUS INVESTMENTS, THE LOWELL BERRY FOUNDATION IS ABLE TO DISTRIBUTE IT TO THE ORGANIZATIONS DESCRIBED ABOVE, AND THEREFORE, ACHIEVE IT'S CHARITABLE PURPOSE

Part XVII **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization or

b Other transactions

(4) Reimbursement arrangements.

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.

	Yes	No
1a(1)		No
1a(2)		No
1b(1)		No
1b(2)		No
1b(3)		No
1b(4)		No
1b(5)		No
1b(6)		No
1c		No

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations?

described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship		
<p>Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.</p>				
<p>*****</p>	<p>2012-03-01</p>	<p>*****</p>		
<p>Signature of officer or trustee</p>	<p>Date</p>	<p>Title</p>		
<p>Sign Here Paid Preparer's Use Only</p>	<p>Preparer's Signature</p>	<p>Date</p>	<p>Check if self-employed</p>	<p>PTIN</p>
	<p>Sherry Matsumoto</p>	<p></p>	<p><input type="checkbox"/></p>	<p></p>
	<p>Firm's name</p>	<p>Harrison Accounting Group Inc</p>	<p></p>	<p></p>
	<p>37272 Maple Street</p>	<p>Firm's address</p>	<p></p>	<p></p>
<p>Fremont, CA 94536</p>	<p>Firm's EIN</p>	<p></p>	<p></p>	
<p></p>	<p>Phone no (510) 793-4323</p>	<p></p>	<p></p>	

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				
JAMIS 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
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 Center 7660 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 School 1516 - 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 Outreach 2161 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 - 13th 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
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 Community 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-Cities 39217 Liberty St B-10 Fremont, CA 94538	Charitable	501(c)3	General support	2,000
Family Aid - Catholic Education 2121 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 Association 1601 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 Housing 535 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 Dev 979 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 Hosp 1700 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 Center 20424 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 Paid during the year				
The Salvation Army PO Box 1884 Monterey, CA 93942	Charitable	501(c)3	General Support	1,000
Saint Edward School 5788 Thornton Ave Newark, CA 94560	Charitable	501(c)3	Special Needs Prog	3,000
Oakland Digital Arts & Literacy Center 1224 Harrison St Oakland, CA 94612	Charitable	501(c)3	General Support	2,500
Northern California Family Center 2244 Pacheco Blvd Martinez, CA 94553	Charitable	501(c)3	General Support	3,000
Loved Twice 4245 College Ave Ste 803 Oakland, CA 94618	Charitable	501(c)3	General Support	5,000
League of Volunteers of Newark 36120 Ruschin Drive Newark, CA 94560	Charitable	501(c)3	Summer Park Program	2,500
John Ernest Foundation PO Box 60225 Palo Alto, CA 94306	Charitable	501(c)3	General Support	1,000
The Independent Institute 100 Swan Way Oakland, CA 94621	Charitable	501(c)3	Scholar Voucher	5,000
Habitot Childrens Museum 2065 Kittridge St Berkeley, CA 94704	Charitable	501(c)3	General Support	2,000
Grace Lutheran Church 2369 Barrett Ave Richmond, CA 94804	Charitable	501(c)3	Choir/Music Prog	2,500
First Presbyterian Church of Fresno 1540 M Street Fresno, CA 93721	Charitable	501(c)3	J Evans Family Fund	2,000
Cornerstone Comm Dev Corp 1395 Bancroft Ave San Leandro, CA 94577	Charitable	501(c)3	General Support	3,000
Community Resources for Science 1611 San Pablo Ave Ste 108 Berkeley, CA 94702	Charitable	501(c)3	General Support	3,000
Clausen House Inc 88 Vernon St Oakland, CA 94610	Charitable	501(c)3	Indep living services	3,000
Child Abuse Prevention Council of CC 1410 Danzig Plaza Ste 110 Concord, CA 94520	Charitable	501(c)3	Newborn Connection	3,000
Bread of Life EPA PO Box 52070 East Palo Alto, CA 94303	Charitable	501(c)3	General Support	1,000
Boy Scouts of America Council 1001 Davis St San Leandro, CA 94577	Charitable	501(c)3	Camperships	4,000
Alameda Boys & Girls Club PO Box 1069 Alameda, CA 94501	Charitable	501(c)3	Power hour program	4,000
American Red Cross PO Box 4002018 Des Moines, IA 50340	Charitable	501(c)3	Japan Earthquake	1,000
Wardrobe for Opportunity 570 14th St Ste 5 Oakland, CA 94512	Charitable	501(c)3	General Support	5,000
Walnut Creek Education Foundation 960 Ygnacio Valley Rd Walnut Creek, CA 94596	Charitable	501(c)3	General Support	1,000
Super Stars Literacy Inc 675 Hegenburger Rd Ste 250 Oakland, CA 94621	Charitable	501(c)3	General Support	4,000
Stanford Univ - Dept of Athletics 326 Galvez Street Stanford, CA 94305	Charitable	501(c)3	Various programs	20,000
San Ramon Valley Ed Fnd AlamoStone 100 Wilson Rd Alamo, CA 94507	Charitable	501(c)3	General support	1,265
San Francisco Ballet Assoc 455 Franklin St San Francisco, CA 94102	Charitable	501(c)3	General Support	750
PTA CA Congress of PTA 561 Merriewood Dr Lafayette, CA 94549	Charitable	501(c)3	General Support	2,000
Peninsula Ball Foundation PO Box 1032 Menlo Park, CA 94026	Charitable	501(c)3	General Support	500
Oakland Youth Chorus 2501 Harrison St Oakland, CA 94612	Charitable	501(c)3	General support	2,000
John Muir Health Foundation 1400 Treat Blvd Ste 30 Walnut Creek, CA 94597	Charitable	501(c)3	Caring Hands	2,000
Hispanic Ministry Center Inc 2321 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 Program 2020 North Broadway Ste 204 Walnut Creek, CA 94596	Charitable	501(c)3	General Support	5,000
Contra Costa Kops for Kids 1430 Willow Pass Rd 130 Concord, CA 94520	Charitable	501(c)3	General Support	2,000
Center for the Ed of Infant Deaf 1035 Grayson St Berkeley, CA 94710	Charitable	501(c)3	General support	2,000
Carmel Foundation PO Box 1050 Carmel, CA 93921	Charitable	501(c)3	General Support	500
Carmel-by-the-Sea Public Library Found PO 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 WWP 7020 ACS Skinner Pkwy Ste 100 Jacksonville, FL 32256	Charitable	501(c)3	In Memory of GE	500
WellSpring PO 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 Medicine 2700 San Hill Rd Stanford, CA 94025	Charitable	501(c)3	Women's Cancer/Mood Disorder	7,150
Stanford University Medical Ctr 326 Galvez St Stanford, CA 94305	Charitable	501(c)3	Mood disorder	3,000
St Stephens Episcopal Church 66 St Stephens Dr Orinda, CA 94563	Charitable	501(c)3	General Support	5,300
San Ramon Valley Thunderbirds PO Box 490 San Ramon, CA 94583	Charitable	501(c)3	General Support	10,000
San Francisco Symphony Davies Symphony Hall San Francisco, CA 94102	Charitable	501(c)3	General Support/School Music Prog	1,250
Punahou School 1601 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 Found PO 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 Institution 326 Galvez St Stanford, CA 94305	Charitable	501(c)3	General Support	3,000
CU-Boulder Alumni Scholarship Fund 4740 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 Center 2201 Broadway Ste 600 Oakland, CA 94612	Charitable	501(c)3	General Support	100
Character Choice Inc 1545 Tanaka Dr Erie, CO 80516	Charitable	501(c)3	General Support	2,000
Bayshore Christian Ministries 1001 Beech St East Palo Alto, CA 94303	Charitable	501(c)3	General Support	2,500
All Saints Episcopal Church PO Box 1296 Carmel, CA 93921	Charitable	501(c)3	General Support	3,000
VESTIA 400 Ellinwood Way Pleasant Hill, CA 94523	Charitable	501(c)3	Camperships	6,000
Trips for Kids Marin 138 Sunnyside Mill Valley, CA 94941	Charitable	501(c)3	General Support/Bikes for Tots	4,500
Todays Youth Matter 461 Valley Way Milpitas, CA 95035	Charitable	501(c)3	General support	4,000
Tides Center The Presidio PO 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 Paid during the year				
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 County 1815 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 Costa 1985 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 County 1543 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 Trauma Proj	2,000
Community Alliance for LearningPO Box 6098 Albany, CA 94706	Charitable	501(c)3	Writer Coach	2,500
Catholic Charities of the Diocese 433 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 Action 405 - 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 Wheels 6955 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 Paid during the year				
Alameda County Library Foundation 2450 Stevenson Blvd Fremont, CA 94538	Charitable	501(c)3	Homework Club	5,000
Young Life - Diablo Valley 2363 Boulevard Circle Ste 102 Walnut Creek, CA 94595	Charitable	501(c)3	General Support/Camperships	32,500
Young Life of Concord PO Box 563 Concord, CA 94522	Charitable	501(c)3	General Support/Camperships	12,000
School of Urban Missions PO Box 14145 Oakland, CA 94614	Charitable	501(c)3	Various programs	147,500
Prison Fellowship Ministries 44180 Riverside Pkwy Lansdowne, VA 20176	Charitable	501(c)3	Angel Tree	25,000
Patten University 2433 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 Connection 1717 N California Blvd Ste 3D Walnut Creek, CA 94596	Charitable	501(c)3	General Support	75,000
Joni & Friends - SF Bay Area 3553 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 Ministries PO Box 777 Honolulu, HI 96808	Charitable	501(c)3	General Ministry	30,000
Harbor House Ministries Inc 1811 - 11th Ave Oakland, CA 94606	Charitable	501(c)3	General Support	30,000
Fuller Theological Seminary 135 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 Ministries PO Box 23833 Oakland, CA 94623	Charitable	501(c)3	General Support	40,000
Campus Crusade for Christ 1922 Grant St Apt 5 Berkeley, CA 94703	Charitable	501(c)3	Leadership Institute	10,500
The Bay Area Urban Network 745 - 105th Ave Oakland, CA 94603	Charitable	501(c)3	Various programs	133,250
Bay Area Rescue Mission 2114 Macdonald Ave Richmond, CA 94802	Charitable	501(c)3	General Support	20,000
Total				1,293,333
► 3a				

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 management 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			