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Form

990-PF

Department of the Treasury  
Internal Revenue Service

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

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

OMB No 1545-0052





2012


Open to Public Inspection

For calendar year 2012, or tax year beginning 01-01-2012 , and ending 12-31-2012

Name of foundation CONNIE AND BOB LURIE FOUNDATION INC		A Employer identification number  20-8004479	
Number and street (or P O box number if mail is not delivered to street address) 369 PINE STREET ROOM/SUITE 711		B Telephone number (see instructions)  (415) 399-8512	
City or town, state, and ZIP code SAN FRANCISCO, CA 94104		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input checked="" type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 17,434,544	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

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 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 <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments	58,762	58,762		
	4 Dividends and interest from securities. . . . .	293,946	293,946		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,074,019			
	b Gross sales price for all assets on line 6a _____ 5,584,536				
	7 Capital gain net income (from Part IV , line 2 ) . . . .		1,074,019		
	8 Net short-term capital gain . . . . .				
	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) . . . . .	1,680	1,680		
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	1,428,407	1,428,407		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .	9,655			9,655
	c Other professional fees (attach schedule) . . . . .	130,927	130,927		
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	32,619	7,619		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	927	827		100
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	174,128	139,373		9,755
	25 Contributions, gifts, grants paid . . . . .	820,242			820,242
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	994,370	139,373		829,997
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	434,037			
	b <b>Net investment income</b> (if negative, enter -0-)		1,289,034		
	c <b>Adjusted net income</b> (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing . . . . .			
	2	Savings and temporary cash investments . . . . .	461,273	1,357,386	1,357,386
	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 . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)		 306,005	303,915
	b	Investments—corporate stock (attach schedule) . . . . .	7,883,011	 6,674,078	9,201,996
	c	Investments—corporate bonds (attach schedule). . . . .	3,291,836	 1,957,723	2,025,024
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .	3,079,144	 4,288,505	4,546,223
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	14,715,264	14,583,697	17,434,544	
Liabilities	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22) . . . . .		0	
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 . . . . .	14,715,264	14,583,697	
	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) . . . . .	14,715,264	14,583,697	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	14,715,264	14,583,697	

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 14,715,264
2	Enter amount from Part I, line 27a . . . . .	2 434,037
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3 . . . . .	4 15,149,301
5	Decreases not included in line 2 (itemize) ▶  _____	5 565,604
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6 14,583,697

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	PUBLICLY TRADED SECURITIES	P	2010-01-01	2012-12-31
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 5,584,536		4,510,517	1,074,019
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			1,074,019
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,074,019
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 instructions) If (loss), enter -0- in Part I, line 8 . . . . .		3	

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2011	458,276	16,492,783	0 027786
2010	359,009	8,833,052	0 040644
2009	454,152	7,147,497	0 063540
2008	380,285	8,998,502	0 042261
2007	101,252	10,317,449	0 009814

2 Total of line 1, column (d). . . . .	2	0 184045
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 036809
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5. . . . .	4	17,209,760
5 Multiply line 4 by line 3. . . . .	5	633,474
6 Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	12,890
7 Add lines 5 and 6. . . . .	7	646,364
8 Enter qualifying distributions from Part XII, line 4. . . . .	8	829,997

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

Part 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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		1	12,890	
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	12,890	
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	12,890	
6		Credits/Payments				
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	18,046		
b		Exempt foreign organizations—tax withheld at source . . . . .	6b			
c		Tax paid with application for extension of time to file (Form 8868)	6c	10,000		
d		Backup withholding erroneously withheld . . . . .	6d			
7		Total credits and payments Add lines 6a through 6d. . . . .		7	28,046	
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	15,156	
11		Enter the amount of line 10 to be Credited to 2013 estimated tax	15,156	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		
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 <ul style="list-style-type: none"><li>By language in the governing instrument, or</li><li>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? . . . . .</li></ul>	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 instructions)  DE _____			
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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? 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 instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	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 ▶WILLIAM M HARRIS Telephone no ▶(415) 399-8512 Located at ▶369 PINE STREET STE 711 369 PINE STREET STE 711 SAN FRANCISCO CA ZIP +4 ▶94104			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶	15		
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . .	16		No
See 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ). . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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. . . . . ▶ <input type="checkbox"/>	1b		
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 2012?. . . . .	1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement—see instructions ). . . . .	2b		
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> 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?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2012 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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.</i> ). . . . .	3b		
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 2012?	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 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 <b>any</b> of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?		5b		
Organizations relying on a current notice regarding disaster assistance check here.		<input checked="" type="checkbox"/>		
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 type="checkbox"/> No	
If "Yes," attach the statement required by Regulations section 53.4945–5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b No		
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see 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
ROBERT A LURIE 369 PINE STREET STE 711 SAN FRANCISCO, CA 94104	VICE PRESIDE 1 00	0	0	0
CONNIE L LURIE 369 PINE STREET STE 711 SAN FRANCISCO, CA 94104	PRESIDENT/SE 1 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

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 instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
ENSEMBLE CAPITAL MANAGEMENT LLC ENSEMBLE CAPITAL MANAGEMENT LLC	INVESTMENT	130,927
1350 BAYSHORE HIGHWAY STE 460 1350 BAYSHORE HIGHWAY STE 460 BURLINGAME, CA 94010		
Total number of others receiving over \$50,000 for professional services. . . . .		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
<b>1</b> N/A	
<b>2</b>	
All other program-related investments See page 24 of the instructions	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3.	



Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	16,558,405
b	Average of monthly cash balances. . . . .	1b	913,433
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	17,471,838
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	
3	Subtract line 2 from line 1d. . . . .	3	17,471,838
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	262,078
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	17,209,760
6	Minimum investment return. Enter 5% of line 5. . . . .	6	860,488

Part XI

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

1	Minimum investment return from Part X, line 6. . . . .	1	860,488
2a	Tax on investment income for 2012 from Part VI, line 5. . . . .	2a	12,890
b	Income tax for 2012 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	12,890
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	847,598
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	847,598
6	Deduction from distributable amount (see instructions). . . . .	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	847,598

Part XII

Qualifying Distributions (see 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	829,997
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	829,997
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 instructions). . . . .	5	12,890
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	817,107
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				847,598
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only. . . . .			746,888	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2012				
a From 2007. . . . .				
b From 2008. . . . .				
c From 2009. . . . .				
d From 2010. . . . .				
e From 2011. . . . .				
f Total of lines 3a through e. . . . .				
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 829,997				
a Applied to 2011, but not more than line 2a			746,888	
b Applied to undistributed income of prior years (Election required—see instructions). . . . .				
c Treated as distributions out of corpus (Election required—see instructions). . . . .				
d Applied to 2012 distributable amount. . . . .				83,109
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2012 (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				
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 instructions . . . . .				
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013. . . . .				764,489
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .				
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . . .				
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a. . . . .				
10 Analysis of line 9				
a Excess from 2008. . . .				
b Excess from 2009. . . .				
c Excess from 2010. . . .				
d Excess from 2011. . . .				
e Excess from 2012. . . .				

Part XIVPrivate Operating Foundations (see 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 2012, 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) 2012	(b) 2011	(c) 2010	(d) 2009	
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 XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see 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) )

CONNIE L AND BOB A LURIE

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

NONE

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 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

b

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

c

Any submission deadlines

d

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

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			3a	820,242
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 instructions )
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1</b>	Program service revenue					
<b>a</b>	_____					
<b>b</b>	_____					
<b>c</b>	_____					
<b>d</b>	_____					
<b>e</b>	_____					
<b>f</b>	_____					
<b>g</b>	Fees and contracts from government agencies					
<b>2</b>	Membership dues and assessments. . . .					
<b>3</b>	Interest on savings and temporary cash investments			14	58,762	
<b>4</b>	Dividends and interest from securities. . . .			14	293,946	
<b>5</b>	Net rental income or (loss) from real estate					
<b>a</b>	Debt-financed property. . . . .					
<b>b</b>	Not debt-financed property. . . . .					
<b>6</b>	Net rental income or (loss) from personal property					
<b>7</b>	Other investment income. . . . .					
<b>8</b>	Gain or (loss) from sales of assets other than inventory			18	1,074,019	
<b>9</b>	Net income or (loss) from special events					
<b>10</b>	Gross profit or (loss) from sales of inventory. .					
<b>11</b>	Other revenue <b>a</b> OTHER INCOME _____			14	1,680	
<b>b</b>	_____					
<b>c</b>	_____					
<b>d</b>	_____					
<b>e</b>	_____					
<b>12</b>	Subtotal Add columns (b), (d), and (e). .				1,428,407	
<b>13</b>	<b>Total.</b> Add line 12, columns (b), (d), and (e). . . . .			<b>13</b>		1,428,407

[illegible]

<b>1</b> 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?		<b>Yes</b>	<b>No</b>
<b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of			
<b>(1)</b> Cash. . . . .	<b>1a(1)</b>		<b>No</b>
<b>(2)</b> Other assets. . . . .	<b>1a(2)</b>		<b>No</b>
<b>b</b> Other transactions			
<b>(1)</b> Sales of assets to a noncharitable exempt organization. . . . .	<b>1b(1)</b>		<b>No</b>
<b>(2)</b> Purchases of assets from a noncharitable exempt organization. . . . .	<b>1b(2)</b>		<b>No</b>
<b>(3)</b> Rental of facilities, equipment, or other assets. . . . .	<b>1b(3)</b>		<b>No</b>
<b>(4)</b> Reimbursement arrangements. . . . .	<b>1b(4)</b>		<b>No</b>
<b>(5)</b> Loans or loan guarantees. . . . .	<b>1b(5)</b>		<b>No</b>
<b>(6)</b> Performance of services or membership or fundraising solicitations. . . . .	<b>1b(6)</b>		<b>No</b>
<b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees. . . . .	<b>1c</b>		<b>No</b>
<b>d</b> If the answer to any of the above is "Yes," complete the following schedule. Column <b>(b)</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 <b>(d)</b> the value of the goods, other assets, or services received.			

[illegible]

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . ☐ Yes ☒ No

**b** If "Yes," complete the following schedule

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

**Sign  
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

\* \* \* \* \*

2013-11-04

\* \* \* \* \*

Signature of officer or trustee

Date \_\_\_\_\_

Title

May the IRS discuss this return with the preparer shown below (see instr )? ☒ **Yes** ☐ **No**

**Paid  
Preparer  
Use Only**

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input checked="checked" type="checkbox"/>	PTIN
KARIFA DIAWARA	KARIFA DIAWARA	2013-11-14		
Firm's name	DIAWARA & ASSOCIATES CPAS		Firm's EIN	
	2225 EAST BAYSHORE ROAD SUITE 200			
Firm's address	PALO ALTO, CA 94303		Phone no (650) 521-1620	

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)				
<b>a</b> <i>Paid during the year</i>				
AIM HIGH AIM HIGH 2030 HARRISON ST 2030 HARRISON ST SAN FRANCISCO,CA 94110	NONE	501(C)(3)	CHARITY	5,000
ALZHEIMERS FOUNDATION ALZHEIMERS FOUNDATION 322 8TH AVE 7TH FL 322 8TH AVE 7TH FL NEWYORK,NY 10001	NONE	501(C)(3)	CHARITY	1,000
AMERICAN JAZZ INSTITUTE AMERICAN JAZZ INSTITUTE PO BOX 5716 PO BOX 5716 PASADENA,CA 91117	NONE	501(C)(3)	CHARITY	500
AMNESTY INTERNATIONAL USA INC AMNESTY INTERNATIONAL USA INC 5 PENN PLAZA 5 PENN PLAZA NEWYORK,NY 10001	NONE	501(C)(3)	CHARITY	1,000
ARCS FOUNDATION ARCS FOUNDATION PO BOX 29405 PO BOX 29405 SAN FRANCISCO,CA 94129	NONE	501(C)(3)	CHARITY	3,500
ART OF YOGA PROJECT ART OF YOGA PROJECT 555 BRYANT STREET 232 555 BRYANT STEET 232 PALO ALTO,CA 943011704	NONE	501(C)(3)	CHARITY	1,000
BOY SCOUTS OF AMERICA BOY SCOUTS OF AMERICA PO BOX 152079 PO BOX 152079 IRVING,TX 750152079	NONE	501(C)(3)	CHARITY	1,000
BOYS & GIRLS CLUB BOYS & GIRLS CLUB OF THE PENINSULA 401 PIERCE RD 401 PIERCE RD MENLA PARK,CA 94025	NONE	501(C)(3)	CHARITY	35,000
BOYS & GIRLS CLUB OF THE COACHELLA BOYS & GIRLS CLUB OF THE COACHELLA VALLEY 42600 COOK STREET 42600 COOK STREET PALM BEACH,CA 92211	NONE	501(C)(3)	CHARITY	5,000
BRING ME A BOOK FOUNDATION BRING ME A BOOK FOUNDATION 1045 TERRA BELLA AVE 1045 TERRA BELLA AVE MOUNTAIN VIEW,CA 94043	NONE	501(C)(3)	CHARITY	1,000
CALIFORNIA STATE PARKS FN CALIFORNIA STATE PARKS FOUNDATION 50 FRANCISCO ST STE 110 50 FRANCISCO ST STE 110 SAN FRANCISCO,CA 94133	NONE	501(C)(3)	CHARITY	3,000
CANARY FOUNDATION CANARY FOUNDATION 1501 S CALIFORNIA AVE 1501 S CALIFORNIA AVE PALO ALTO,CA 94304	NONE	501(C)(3)	CHARITY	1,000
CARMEL IDEAS FOUNDATION CARMEL IDEAS FOUNDATION PO BOX 2424 PO BOX 2424 CARMEL,CA 93921	NONE	501(C)(3)	CHARITY	1,000
CHILD ADVOCATES OF SV CHILD ADVOCATES OF SILICON VALLEY INC 509 VALLEY WAY 509 VALLEY WAY MILPITAS,CA 95035	NONE	501(C)(3)	CHARITY	1,000
CHILDREN HEALTH COUNCIL CHILDREN HEALTH COUNCIL INC 650 CLARK WAY 650 CLARK WAY PALO ALTO,CA 94304	NONE	501(C)(3)	CHARITY	1,000

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
COMMON GROUND FOUNDATION COMMON GROUND FOUNDATION 47 W POLK STE 172 47 W POLK STE 172 CHICAGO,IL 60605	NONE	501(C)(3)	CHARITY	1,000
CYSTIC FIBROSIS RESEARCH CYSTIC FIBROSIS RESEARCH 10550 N TORREY PINES RD 10550 N TORREY PINES RD LA JOLLA,CA 92037	NONE	501(C)(3)	CHARITY	500
DAMON RUNYON CANCER RESEARCH FND DAMON RUNYON CANCER RESEARCH FND 55 BROADWAY STE 302 55 BROADWAY STE 302 NEW YORK,NY 10006	NONE	501(C)(3)	CHARITY	102,000
DE MARILLAC ACADEMY DE MARRILLAC ACADEMY 175 GOLDEN GATE AVE 175 GOLDEN GATE AVE SAN FRANCISCO,CA 94102	NONE	501(C)(3)	CHARITY	1,000
DIAN FOSSEY GORILLA FUND DIAN FOSSEY GORILLA FUND 800 CHEROKEE AVE 800 CHEROKEE AVE ATLANTA,GA 30315	NONE	501(C)(3)	CHARITY	2,500
DOCTORS WITHOUT BORDERS DOCTORS WITHOUT BORDERS USA INC 333 7TH AVE 2ND FLOOR 333 7TH AVE 2ND FLOOR NEW YORK,NY 10001	NONE	501(C)(3)	CHARITY	5,000
EAST PALO ALTO COLLEGE PREP EAST PALO ALTO COLLEGE PREP 1041 MYRTLE ST 1041 MYRTLE ST EAST PALO ALTO,CA 94303	NONE	501(C)(3)	CHARITY	20,000
EISENHOWER MEDICAL CENTER EISENHOWER MEDICAL CENTER 39000 BOB HOPE DR 39000 BOD HOPE DR RANCHO MIRAGE,CA 92270	NONE	501(C)(3)	CHARITY	20,000
EXPLORATORIUM EXPLORATORIUM 15/17 PIER 15/17 PIER SAN FRANCISCO,CA 94111	NONE	501(C)(3)	CHARITY	140,000
FOUNDATION FOR COLLEGE EDUCATION FOUNDATION FOR COLLEGE EDUCATION 2160 EUCLID AVE 2160 EUCLID AVE EAST PALO ALTO,CA 94303	NONE	501(C)(3)	CHARITY	1,000
FRESH LIFELINES FOR YOUTH FRESH LIFELINES FOR YOUTH INC 568 VALLEY WAY 568 VALLEY WAY MILPITAS,CA 95035	NONE	501(C)(3)	CHARITY	1,000
GIRLS INC OF THE CENTRAL GIRLS INC OF THE CENTRALCOAST 369 MAIN ST STE M 369 MAIN ST STE M SALINAS,CA 93901	NONE	501(C)(3)	CHARITY	2,500
GLADSTONE INSTITUTES GLADSTONE INSTITUTES 1650 OWENS ST 1650 OWENS ST SAN FRANCISCO,CA 94158	NONE	501(C)(3)	CHARITY	2,500
GLIDE GLIDE 330 ELLIS ST 330 ELLIS ST SAN FRANCISCO,CA 94102	NONE	501(C)(3)	CHARITY	1,000
GLOBAL FUND FOR WOMEN GLOBAL FUND FOR WOMEN INC 222 SUTTER ST STE 500 222 SUTTER ST STE 500 SAN FRANCISCO,CA 94108	NONE	501(C)(3)	CHARITY	1,000



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)				
<b>a</b> Paid during the year				
GLOBAL HERITAGE FUND GLOBAL HERITAGE FUND 625 EMERSON ST STE 200 625 EMERSON ST STE 200 PALO ALTO,CA 94301	NONE	501(C)(3)	CHARITY	1,000
GORILLA FOUNDATION GORILLA FOUNDATION 1733 WOODSIDE RD STE 330 1733 WOODSIDE RD STE 330 REDWOOD CITY,CA 94061	NONE	501(C)(3)	CHARITY	2,500
HABITAT FOR HUMANITY GRT HABITAT FOR HUMANITY GREATER SAN FRANCISCO INC 645 HARRISON ST 645 HARRISON ST SAN FRANCISCO,CA 94107	NONE	501(C)(3)	CHARITY	1,000
HUMANE SOCIETY SILICON VALLEY HUMANE SOCIETY SILICON VALLEY 901 AMES AVE 901 AMES AVE MILPITAS,CA 95035	NONE	501(C)(3)	CHARITY	1,000
JUNIOR LEAGUE OF PA MID-P JUNIOR LEAGUE OF PALO ALTO - MID PENINSULA 555 RAVENSWOOD AVE 555 RAVENSWOOD AVE MENLO PARK,CA 94025	NONE	501(C)(3)	CHARITY	1,000
JUNIOR LEAGUE OF SAN FRANCISCO JUNIOR LEAGUE OF SAN FRANCISCO 2226 FILLMORE ST 2226 FILLMORE ST SAN FRANCISCO,CA 94115	NONE	501(C)(3)	CHARITY	1,000
KASIGAU STUDENT ED FUND KASIGAU STUDENT ED FUND 1 LA CAMPANA RD 1 LA CAMPANA RD ORINDA,CA 94563	NONE	501(C)(3)	CHARITY	2,000
KIPP BAY AREA SCHOOLS KIPP BAY AREA SCHOOLS 426 17TH ST STE 200 426 17TH ST STE 200 OAKLAND,CA 94612	NONE	501(C)(3)	CHARITY	25,000
LARKIN STREET YOUTH SERVICES LARKIN STREET YOUTH SERVICES 701 SUTTER ST STE 2 701 SUTTER ST STE 2 SAN FRANCISCO,CA 94109	NONE	501(C)(3)	CHARITY	5,000
LUCILE S PACKARD CHILD H LUCILE SALTER PACKARD CHILDRENS HOSPITAL 725 WELCH ROAD MC5553 725 WELCH ROAD MC5553 PALO ALTO,CA 94304	NONE	501(C)(3)	CHARITY	200,000
MD ANDERSON CANCER CENTER MD ANDERSON CANCER CENTER 1515 HOLCOMBE BLVD 1515 HOLCOMBE BLVD HOUSTIN,TX 77030	NONE	501(C)(3)	CHARITY	1,000
MERCY BEYOND BORDERS MERCY BEYOND BORDERS 1885 DE LA CRUZ BLVD 101 1885 DE LA CRUZ BLVD 101 SANTA CLARA,CA 95050	NONE	501(C)(3)	CHARITY	1,000
MONTEREY BAY AQUARIUM FND MONTEREY BAY AQUARIUM FND 886 CANNERY ROW 886 CANNERY ROW MONTEREY,CA 93940	NONE	501(C)(3)	CHARITY	3,000
NATIONAL ABORTION RIGHTS ACTION LEA NATIONAL ABORTION RIGHTS ACTION LEAGUE FN 1156 15TH ST STE 700 1156 15TH ST STE 700 WASHINGTON,DC 20005	NONE	501(C)(3)	CHARITY	10,000
NEPALESE YOUTH OP FND NEPALESE YOUTH OPPORTUNITY FOUNDATION INC 3030 BRIDGEWAY STE 211 3030 BRIDGEWAY STE 211 SAUSALITO,CA 94965	NONE	501(C)(3)	CHARITY	1,000


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)				
<b>a</b> <i>Paid during the year</i>				
PATHWAYS HOSPICE FND PATHWAYS HOSPICE FOUNDATION 585 N MARY AVE 585 N MARY AVE SUNNYVALE,CA 94085	NONE	501(C)(3)	CHARITY	10,000
PENINSULA VOLUNTEERS INC PENINSULA VOLUNTEERS INC 800 MIDDLE AVE 800 MIDDLE AVE MENLO PARK,CA 94025	NONE	501(C)(3)	CHARITY	1,000
PHILANTHROPIC VENTURES FOUNDATION PHILANTHROPIC VENTURES FOUNDATION 1222 PRESERVATION PARK WY 1222 PRESERVATION PARK WY OAKLAND,CA 946121201	NONE	501(C)(3)	CHARITY	10,000
PLANNED PARENTHOOD MAR MONTE PLANNED PARENTHOOD MAR MONTE 27287 PATRICK AVE 27287 PATRICK AVE HAYWARD,CA 94544	NONE	501(C)(3)	CHARITY	2,000
PUENTE DE LA COSTA PUENTE DE LA COSTA 620 NORTH ST 620 NORTH ST PESCADERO,CA 94060	NONE	501(C)(3)	CHARITY	1,100
RAPE TRAUMA SERVICES RAPE TRAUMA SERVICES 1860 EL CAMINO R STE 406 1860 EL CAMINO R STE 406 BURLINGAME,CA 94010	NONE	501(C)(3)	CHARITY	1,000
REBUILDING TOGETHER PEN REBUILDING TOGETHER PENINSULA 841 KAYNYNE ST 841 KAYNYNE ST REDWOOD CITY,CA 94063	NONE	501(C)(3)	CHARITY	1,000
RISING INTERNATIONAL RISING INTERNATIONAL 300 POTRERO ST 300 POTRERO ST SANTA CRUZ,CA 95060	NONE	501(C)(3)	CHARITY	1,000
ROYAL FAMILY KIDS ROYAL FAMILY KIDS 3000 W MACARTHUR BLVD 3000 W MACARTHUR BLVD SANTA ANA,CA 92704	NONE	501(C)(3)	CHARITY	3,000
SAN FRANCISCO FOOD BANK SAN FRANCISCO FOOD BANK 900 PENNSYLVANIA ST 900 PENNSYLVANIA ST SAN FRANCISCO,CA 94107	NONE	501(C)(3)	CHARITY	10,000
SAN JOSE STATE UNIVERSITY SAN JOSE STATE UNIVERSITY 1 WASHINGTON SQ 1 WASHINGTON SQ SAN JOSE,CA 95112	NONE	501(C)(3)	CHARITY	1,000
SEASON OF SHARING SEASON OF SHARING PO BOX 44740 PO BOX 44740 SAN FRANCISCO,CA 94144	NONE	501(C)(3)	CHARITY	3,000
SECOND HARVEST FOOD BANK OF SANTA C SECOND HARVEST FOOD BANK OF SANTA CLARA 1051 BING STREET 1051 BING STREET SAN CARLOS,CA 94070	NONE	501(C)(3)	CHARITY	1,000
SELBY EDUCATION FOUNDATION SELBY EDUCATION FOUNDATION 50 WOODSIDE PLAZA 50 WOODSIDE PLAZA REDWOOD CITY,CA 94061	NONE	501(C)(3)	CHARITY	1,000
SELBY LANE SCHOOL SELBY LANE SCHOOL 170 SELBY LANE 170 SELBY LANE ATHERTON,CA 94027	NONE	501(C)(3)	CHARITY	15,642

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)				
<b>a</b> <i>Paid during the year</i>				
SESAME WORKSHOP SESAME WORKSHOP 1900 BROADWAY 1900 BROADWAY NEW YORK,NY 10023	NONE	501(C)(3)	CHARITY	15,000
SF GENERAL HOSPITAL FND SF GENERAL HOSPITAL FND 1001 POTRERO AVE 1001 POTRERO AVE SAN FRANCISCO,CA 94110	NONE	501(C)(3)	CHARITY	1,000
SF GIANTS COMMUNITY FUND SF GIANTS COMMUNITY FUND 24 WILLIE MAYS PLAZA 24 WILLIE MAYS PLAZA SAN FRANCISCO,CA 94107	NONE	501(C)(3)	CHARITY	1,000
SF ZOOLOGICAL SOCIETY SF ZOOLOGICAL SOCIETY 1 ZOO ROAD 1 ZOO ROAD SAN FRANCISCO,CA 94132	NONE	501(C)(3)	CHARITY	3,500
SHELTER NETWORK OF SAN MATEO COUNTY SHELTER NETWORK OF SAN MATEO COUNTY 1580 MAPLE ST 1580 MAPLE ST REDWOOD CITY,CA 94063	NONE	501(C)(3)	CHARITY	5,000
SILICON VALLEY CHILDRENS SILICON VALLEY CHILDREN FUND 4525 UNION AVE 4525 UNION AVE SAN JOSE,CA 95124	NONE	501(C)(3)	CHARITY	1,000
SILICON VALLEY COMMUNITY FND SILICON VALLEY COMMUNITY FND 2440 WEST EL CAMINO REAL 2440 WEST EL CAMINO REAL MOUNTAIN VIEW,CA 94040	NONE	501(C)(3)	CHARITY	3,000
SPARK SPARK 438 CAMINO DEL RIO 110 438 CAMINO DEL RIO110 SAN DIEGO,CA 92108	NONE	501(C)(3)	CHARITY	1,000
ST ANTHONY FOUNDATION ST ANTHONY FOUNDATION 150 GOLDEN GATE AVE 150 GOLDEN GATE AVE SAN FRANCISCO,CA 94102	NONE	501(C)(3)	CHARITY	1,000
STANFORD - HOOVER INSTITUTION STANFORD - HOOVER INSTITUTION (NUCLEAR PROLIF) 550 SERRA MALL 550 SERRA MALL STANFORD,CA 94305	NONE	501(C)(3)	CHARITY	5,000
STANFORD JAZZ WORKSHOP STANFORD JASS WORKSHOP PO BOX 20454 PO BOX 20454 STANFORD,CA 94309	NONE	501(C)(3)	CHARITY	2,500
STANFORD WOMEN'S CANCER CENTER STANFORD WOMEN'S CANCER CENTER 900 BLAKE WILBUR DRIVE 900 BLAKE WILBUR DRIVE STANFORD,CA 94304	NONE	501(C)(3)	CHARITY	1,000
STAR VISTA STAR VISTA 610 ELM ST STE 212 610 ELM ST STE 212 SAN CARLOS,CA 94070	NONE	501(C)(3)	CHARITY	1,000
STUDENTS RISING ABOVE STUDENTS RISING ABOE PO BOX 29174 PO BOX 29174 SAN FRANCISCO,CA 94129	NONE	501(C)(3)	CHARITY	2,000
TEEN SUCCESS INC TEEN SUCCESS INC 550A VALLEY WAY 550A WALLEY WAY MILPITAS,CA 95035	NONE	501(C)(3)	CHARITY	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)				
<b>a</b> Paid during the year				
TEEN TALK SEXUALITY EDUCATION TEEN TALK SEXUALITY EDUCATION 120 JAMES AVE 120 JAMES AVE REDWOOD CITY,CA 94062	NONE	501(C)(3)	CHARITY	1,000
THE DAWN REDWOODS CHARITABLE TRUST THE DAWN REDWOODS CHARITABLE TRUST ONE BLACKFIELD DR 331 ONE BLACKFIELD DR 331 TIBURON,CA 94920	NONE	501(C)(3)	CHARITY	7,500
THE IMAGINE BUS PROJECT THE IMAGINE BUS PROJECT 1012 TORNEY AVE 1012 TORNEY AVE SAN FRANCISCO,CA 94129	NONE	501(C)(3)	CHARITY	1,000
THE LIVING DESERT THE LIVING DESERT 47900 PORTOLA AVE 47900 PORTOLA AVE PALM DESERT,CA 92260	NONE	501(C)(3)	CHARITY	27,000
UNITED SERVICE ORGANIZATIONS UNITED SERVICE ORGANIZATIONS PO BOX 96322 PO BOX 96322 WASHINGTON,DC 20090	NONE	501(C)(3)	CHARITY	1,000
VISTA CENTER - BLIND & VISUALLY IMP VISTA CENTER - BLIND & VISUALLY IMPAIRED 2470 EL CAMINO REAL 2470 EL CAMINO REAL PALO ALTO,CA 94306	NONE	501(C)(3)	CHARITY	1,000
VITTANA VITTANA 318 FIRST AVE STE 310 318 FIRST AVE STE 310 SEATTLE,WA 98104	NONE	501(C)(3)	CHARITY	1,000
WILDLIFE ASSOCIATES WILDLIFE ASSOCIATES PO BOX 3098 PO BOX 3098 HALF MOON BAY,CA 94019	NONE	501(C)(3)	CHARITY	55,000
WORKING BOYS CENTER ECUADOR WORKING BOYS CENTER ECUADOR 12605 W NORTH AVE 130 12605 W NORTH AVE 130 BROOKFIELD,WI 53005	NONE	501(C)(3)	CHARITY	1,000
<b>Total . . . . .</b>  <b>3a</b>				820,242

## TY 2012 Accounting Fees Schedule

**Name:** CONNIE AND BOB LURIE FOUNDATION INC

**EIN:** 20-8004479

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOUNDATION ADMINISTRATION	9,655			9,655

## TY 2012 Compensation Explanation

**Name:** CONNIE AND BOB LURIE FOUNDATION INC

**EIN:** 20-8004479

Person Name	Explanation
ROBERT A LURIE	
CONNIE L LURIE	

**TY 2012 Investments Corporate  
Bonds Schedule**

**Name:** CONNIE AND BOB LURIE FOUNDATION INC  
**EIN:** 20-8004479

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PUBLICLY TRATED BONDS	1,957,723	2,025,024

**TY 2012 Investments Corporate  
Stock Schedule****Name:** CONNIE AND BOB LURIE FOUNDATION INC**EIN:** 20-8004479

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PUBLICLY TRATED SECURITIES	6,674,078	9,201,996



# **TY 2012 Investments Government Obligations Schedule**

**Name:** CONNIE AND BOB LURIE FOUNDATION INC

**EIN:** 20-8004479

**US Government Securities - End of  
Year Book Value:**

**US Government Securities - End of  
Year Fair Market Value:**

**State & Local Government  
Securities - End of Year Book  
Value:**

306,005

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

303,915

## TY 2012 Investments - Other Schedule

**Name:** CONNIE AND BOB LURIE FOUNDATION INC

**EIN:** 20-8004479

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PUBLICLY TRATED SECURITIES - ETF, R	AT COST	3,440,567	3,694,288
MUTUAL FUNDS	AT COST	847,938	851,935

## TY 2012 Other Decreases Schedule

**Name:** CONNIE AND BOB LURIE FOUNDATION INC

**EIN:** 20-8004479

Description	Amount
GAAP/TAX BASIS DIFFERENCE - DONATED STOCK	565,604

## TY 2012 Other Expenses Schedule

**Name:** CONNIE AND BOB LURIE FOUNDATION INC

**EIN:** 20-8004479

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
BANK FEES	827	827		
POSTAGE	100			100

## TY 2012 Other Income Schedule

**Name:** CONNIE AND BOB LURIE FOUNDATION INC

**EIN:** 20-8004479

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	1,680	1,680	

## TY 2012 Other Professional Fees Schedule

**Name:** CONNIE AND BOB LURIE FOUNDATION INC

**EIN:** 20-8004479

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	130,927	130,927		

**TY 2012 Taxes Schedule****Name:** CONNIE AND BOB LURIE FOUNDATION INC**EIN:** 20-8004479

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
IRS EXCISE TAX	25,000			
FOREIGN TAXES PAID	7,619	7,619		