efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491305000093

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
CHIZEN FAMILY FOUNDATION

A Employer identification number
26-2450509

Number and street (or P O box number if mail is not delivered to street address)
11100 SANTA MONICA BLVD
ROOM/SUITE 600

Room/suite

B Telephone number (see instructions)
(310) 806-4000

City or town, state, and ZIP code
LOS ANGELES, CA 90025

C If exemption application is pending, check here ☐

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

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 9,234,813

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

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see 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 ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	250,509	250,509		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	81,078			
	b	Gross sales price for all assets on line 6a 351,462				
	7	Capital gain net income (from Part IV, line 2)		81,078		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	331,587	331,587		
Operating and Administrative Expenses	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)				
	c	Other professional fees (attach schedule)	32,754	23,716		9,038
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	14,955	5,084		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	167			160
	24	**Total operating and administrative expenses.** Add lines 13 through 23	47,876	28,800		9,198
	25	Contributions, gifts, grants paid	320,360			320,360
	26	**Total expenses and disbursements.** Add lines 24 and 25	368,236	28,800		329,558
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-36,649			
	b	**Net investment income** (if negative, enter -0-)		302,787		
	c	**Adjusted net income** (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	35,072	41,603	41,603
	2	Savings and temporary cash investments	147,090	288,887	288,887
	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	14,895	10,017	10,017
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	5,313,241	5,931,087	5,931,087
	c	Investments—corporate bonds (attach schedule)	1,208,769	1,302,422	1,302,422
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,519,213	1,660,797	1,660,797
	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)	8,238,280	9,234,813	9,234,813
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** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	8,238,280	9,234,813	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	8,238,280	9,234,813	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	8,238,280	9,234,813	

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	8,238,280
2	Enter amount from Part I, line 27a	2	-36,649
3	Other increases not included in line 2 (itemize) ▶	3	1,033,182
4	Add lines 1, 2, and 3	4	9,234,813
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	9,234,813

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
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	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(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	
a	See Additional Data Table			
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	81,078
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	400,888	9,048,443	0 044305
2010	339,112	7,912,877	0 042856
2009	173,000	6,802,041	0 025434
2008	120,452	4,522,926	0 026631
2007			

2	**Total** of line 1, column (d).	2	0 139226
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 034807
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	8,725,333
5	Multiply line 4 by line 3.	5	303,703
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	3,028
7	Add lines 5 and 6.	7	306,731
8	Enter qualifying distributions from Part XII, line 4.	8	329,558

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 VI **Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ______ **(attach copy of letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	3,028
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	3,028
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	3,028
6	Credits/Payments				
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a	10,017		
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	10,017
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	6,989
11	Enter the amount of line 10 to be **Credited to 2013 estimated tax** ▶ 6,989	**Refunded** ▶		11	

Part VII-A **Statements Regarding Activities**

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		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)?	1b		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? *If "Yes," attach a detailed description of the activities.*	2		No
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? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶CA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 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 ▶ASPIRIANT LLC Telephone no ▶(310) 806-4000

Located at ▶11100 SANTA MONICA BLVD 600 LOS ANGELES CA ZIP +4 ▶90025

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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		
	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 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? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 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? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.)*	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))? ☐ **Yes** ☑ **No**			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ **Yes** ☑ **No**			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ **Yes** ☑ **No**			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ **Yes** ☑ **No**			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ **Yes** ☑ **No**			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ **Yes** ☐ **No**			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ **Yes** ☑ **No**			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		**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? ☐ **Yes** ☑ **No**			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see 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
BRUCE R CHIZEN 11100 SANTA MONICA BLVD 600 LOS ANGELES, CA 90025	PRES, DIRCTR 0 01	0	0	0
GAIL B CHIZEN 11100 SANTA MONICA BLVD 600 LOS ANGELES, CA 90025	TREAS, SECTY 0 01	0	0	0
JESSICA H CHIZEN 11100 SANTA MONICA BLVD 600 LOS ANGELES, CA 90025	DIRECTOR 0 01	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
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	
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
1 N/A	
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 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	8,725,492
b	Average of monthly cash balances	1b	132,714
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	8,858,206
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	8,858,206
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	132,873
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	8,725,333
6	**Minimum investment return.** Enter 5% of line 5	6	436,267

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	436,267
2a	Tax on investment income for 2012 from Part VI, line 5	2a	3,028		
b	Income tax for 2012 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	3,028
3	Distributable amount before adjustments Subtract line 2c from line 1			3	433,239
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	433,239
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	433,239

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	329,558
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	329,558
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	3,028
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	326,530

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				433,239
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			228,508	
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 ▶ $ 329,558				
a Applied to 2011, but not more than line 2a			228,508	
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.				101,050
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				332,189
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 XIV Private 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2012	**(b)** 2011	**(c)** 2010	**(d)** 2009	
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 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))

BRUCE R GAIL B CHIZEN

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 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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				320,360
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	250,509	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	81,078	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .				331,587	

13 **Total.** Add line 12, columns (b), (d), and (e). 13 331,587

(See worksheet in line 13 instructions to verify calculations)

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

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		No
	(2) Other assets	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
	(3) Rental of facilities, equipment, or other assets	1b(3)		No
	(4) Reimbursement arrangements	1b(4)		No
	(5) Loans or loan guarantees	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

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

Sign Here

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

****** | 2013-10-30 | ******

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 ☐	PTIN
RAYMOND EDWARDS	RAYMOND EDWARDS	2013-10-31		

Firm's name ▶	ASPIRIANT LLC	Firm's EIN ▶
Firm's address ▶	11100 SANTA MONICA BLVD STE 600 LOS ANGELES, CA 900253392	Phone no (310) 806-4000

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
2004 943-SHS-DFA EMERGING MARKETS CO	P	2011-02-09	2012-05-16
306 992-SHS-DFA EMERGING MARKETS COR	P	2009-03-12	2012-07-16
296 044-SHS-DFA EMERGING MARKETS COR	P	2011-02-09	2012-12-12
1 007-SHS-DFA EMERGING MARKETS CORE	P	2011-11-10	2012-12-12
456 31-SHS-DFA INT'L SMALL COMPANY	P	2010-04-14	2012-12-12
803 91-SHS-DFA INT'L SMALL COMPANY	P	2011-01-12	2012-12-12
722 907-SHS-DFA US LARGE CAP VALUE	P	2009-03-12	2012-07-16
1165 54-SHS-VANGUARD TOTAL INTL STK	P	2010-04-14	2012-11-05
136 919-SHS-VANGUARD TOTAL INTL STK	P	2010-12-28	2012-11-05
1875 052-SHS-VANGUARD TOTAL INTL STK	P	2011-01-12	2012-11-05
301 967-SHS-VANGUARD TOTAL INTL STK	P	2011-05-11	2012-11-05
161 966-SHS-VANGUARD TOTAL INTL STK	P	2009-12-30	2012-12-12
148 755-SHS-VANGUARD TOTAL INTL STK	P	2010-04-14	2012-12-12
2465 077-SHS-VANGUARD TOTAL INTL STK	P	2011-08-09	2012-12-12

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
35,252		42,696	-7,444
5,438		2,779	2,659
5,860		6,304	-444
20		18	2
7,180		7,157	23
12,649		14,000	-1,351
14,749		7,332	7,417
33,498		35,473	-1,975
3,935		4,269	-334
53,889		60,000	-6,111
8,678		10,000	-1,322
4,837		4,699	138
4,443		4,527	-84
73,625		71,130	2,495

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(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	
			-7,444
			2,659
			-444
			2
			23
			-1,351
			7,417
			-1,975
			-334
			-6,111
			-1,322
			138
			-84
			2,495

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ABILITIES UNITED 525 EAST CHARLESTON ROAD PALO ALTO,CA 94306	NONE	501(C)(3)	CHARITABLE	1,000
ALEARN 186 UNIVERSITY AVENUE LOS ALTOS,CA 94022	NONE	501(C)(3)	CHARITABLE	10,000
AMERICAN CANCER SOCIETY 747 CAMDEN AVE STE B CAMPBELL,CA 95008	NONE	501(C)(3)	CHARITABLE	250
AMERICAN RED CROSS 2025 E STREET NW WASHINGTON,DC 20006	NONE	501(C)(3)	CHARITABLE	5,000
BILL WILSON CENTER 3490 THE ALAMEDA SANTA CLARA,CA 95050	NONE	501(C)(3)	CHARITABLE	500
BOSTON UNIVERSITY 213 BAY STREET RD BOSTON,MA 02215	NONE	501(C)(3)	CHARITABLE	100
BROOKLYN COLLEGE 2900 BEDFORD AVE BROOKLYN,NY 11210	NONE	501(C)(3)	CHARITABLE	1,000
BROWN UNIVERSITY 80 BROWN STREET PROVIDENCE,RI 02906	NONE	501(C)(3)	CHARITABLE	560
BUILD 3 TWIN DOLPHIN DRIVE 375 REDWOOD CITY,CA 94065	NONE	501(C)(3)	CHARITABLE	5,000
BUILDING FUTURES NOW PO BOX 1524 PALO ALTO,CA 94302	NONE	501(C)(3)	CHARITABLE	10,000
CAMP TAWONGA 131 STEUART ST STE 460 SAN FRANCISCO,CA 94105	NONE	501(C)(3)	CHARITABLE	35,000
CANCER PREVENTION INSTITUTE OF CA 2201 WALNUT AVE STE 300 FREMONT,CA 94538	NONE	501(C)(3)	CHARITABLE	1,000
CENTRAL PARK CONSERVANCY 14 E 60TH ST NEW YORK,NY 10022	NONE	501(C)(3)	CHARITABLE	100
CHILDREN'S DISCOVERY MUSEUM 180 WOZ WAY SAN JOSE,CA 95110	NONE	501(C)(3)	CHARITABLE	25,000
CHILDREN'S HEALTH COUNCIL 650 CLARK WAY PALO ALTO,CA 94304	NONE	501(C)(3)	CHARITABLE	1,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
COMMUNITY HEALTH AWARENESS COUNCIL 711 CHURCH ST MOUNTAIN VIEW, CA 94042	NONE	501(C)(3)	CHARITABLE	1,000
CONGREGATION BETH AM 26790 ARASTRADERO RD LOS ALTOS, CA 94022	NONE	501(C)(3)	CHARITABLE	1,000
INNOCENCE PROJECT 900 LAFAYETTE ST STE 105 SANTA CLARA, CA 95050	NONE	501(C)(3)	CHARITABLE	1,000
KQED 2601 MARIPOSA STREET SAN FRANCISCO, CA 94110	NONE	501(C)(3)	CHARITABLE	100
LOS ALTOS HISTORY MUSEUM 51 SOUTH SAN ANTONIO RD LOS ALTOS, CA 94022	NONE	501(C)(3)	CHARITABLE	100
LUCILE PACKARD CHILDREN'S HOSPITAL 400 HAMILTON AVE 340 PALO ALTO, CA 94301	NONE	501(C)(3)	CHARITABLE	1,000
MAKE A WISH FOUNDATION 55 HAWTHRONE ST 8TH FL SAN FRANCISCO, CA 94105	NONE	501(C)(3)	CHARITABLE	250
MANO A MANO 774 SIBLEY MEMORIAL HWY MENDOTA HEIGHTS, MN 55118	NONE	501(C)(3)	CHARITABLE	1,000
MVLA COMMUNITY SCHOLARS 183 HILLVIEW AVENUE LOS ALTOS, CA 94022	NONE	501(C)(3)	CHARITABLE	5,000
NAMI 1010 GOUGH ST SAN FRANCISCO, CA 94109	NONE	501(C)(3)	CHARITABLE	500
NATIONAL MULTIPLE SCLEROSIS SOCIETY 1700 OWENS STREETSTE 190 SAN FRANCISCO, CA 94158	NONE	501(C)(3)	CHARITABLE	250
NEW YORK COLLABORATES FOR AUTISM 162 WEST 56TH ST STE 405 NEW YORK, NY 10019	NONE	501(C)(3)	CHARITABLE	10,000
NEW YORK PUBLIC LIBRARY 476 FIFTH AVE NEW YORK, NY 10018	NONE	501(C)(3)	CHARITABLE	100
RESURGE INTERNATIONAL 857 MAUDE AVENUE MOUNTAIN VIEW, CA 94043	NONE	501(C)(3)	CHARITABLE	10,000
RONALD MCDONALD HOUSE 2555 49TH STREET SACRAMENTO, CA 95817	NONE	501(C)(3)	CHARITABLE	2,600

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SCHOOL OF ARTS AND CULTURE AT MHP 1700 ALUM ROCK AVE SAN JOSE, CA 95116	NONE	501(C)(3)	CHARITABLE	10,000
SCHWAB CHARITABLE FUND 101 MONTGOMERY ST SAN FRANCISCO, CA 94104	NONE	501(C)(3)	CHARITABLE	57,000
SECOND HARVEST FOOD BANK 4001 NORTH FIRST ST SAN JOSE, CA 95134	NONE	501(C)(3)	CHARITABLE	50,000
SHRINERS HOSPITAL 2425 STOCKTON BLVD SACRAMENTO, CA 95817	NONE	501(C)(3)	CHARITABLE	500
SILICON VALLEY EDUCATION FOUNDATION 1400 PARKMOOR AVE STE200 SAN JOSE, CA 95126	NONE	501(C)(3)	CHARITABLE	30,000
SILICON VALLEY FACES 777 NORTH FIRST STSTE220 SAN JOSE, CA 95112	NONE	501(C)(3)	CHARITABLE	1,000
SPECIAL OLYMPICS 3480 BUSKIRK AVE STE 340 PLEASANT HILL, CA 94523	NONE	501(C)(3)	CHARITABLE	200
STRIVE FOR COLLEGE 556 VALLEY WAY MILPITAS, CA 95035	NONE	501(C)(3)	CHARITABLE	2,500
TEACH FOR AMERICA 22 FOURTH STREET 7TH FL SAN FRANCISCO, CA 94103	NONE	501(C)(3)	CHARITABLE	25,000
THEATREWORKS PO BOX 50458 PALO ALTO, CA 94303	NONE	501(C)(3)	CHARITABLE	2,000
TOWER FOUNDATION ONE WASHINGTON SQUARE SAN JOSE, CA 95192	NONE	501(C)(3)	CHARITABLE	10,000
WEST VALLEY WATER POLO FOUNDATION 201 ADA AVE 3 MOUNTAIN VIEW, CA 94043	NONE	501(C)(3)	CHARITABLE	250
YMCA 2400 GRANT RD MOUNTAIN VIEW, CA 94040	NONE	501(C)(3)	CHARITABLE	2,500
Total . . . . ▶ **3a**				320,360

TY 2012 Compensation Explanation

Name: CHIZEN FAMILY FOUNDATION

EIN: 26-2450509

Person Name	Explanation
BRUCE R CHIZEN	
GAIL B CHIZEN	
JESSICA H CHIZEN	

TY 2012 Investments Corporate Bonds Schedule

Name: CHIZEN FAMILY FOUNDATION

EIN: 26-2450509

Name of Bond	End of Year Book Value	End of Year Fair Market Value
VANGUARD INFLATION	199,439	199,439
PIMCO TOTAL RETURN FUND	1,102,983	1,102,983

TY 2012 Investments Corporate Stock Schedule

Name: CHIZEN FAMILY FOUNDATION

EIN: 26-2450509

Name of Stock	End of Year Book Value	End of Year Fair Market Value
BERKSHIRE HATHAWAY B NEW	232,144	232,144
COHEN & STEERS INST	487,373	487,373
DFA EMERGING MARKETS	1,375,439	1,375,439
DFA INTL SMALL CAP VALUE	283,540	283,540
DFA INTL SMALL COMPANY	255,953	255,953
DFA INTL VALUE PORT	401,545	401,545
DFA SMALL CAP PORT	263,810	263,810
DFA SMALL CAP VALUE	512,942	512,942
DFA US LARGE CAP VALUE	693,462	693,462
DFA US MICRO CAP PORT	152,087	152,087
ISHARES FTSE	392,922	392,922
ISHARES TR RUSSELL 100	260,229	260,229
SCHWAB S&P 500 INDEX	189,566	189,566
SPDR DOW JONES INTL R	60,247	60,247
VANGAURD TOTAL INTL	369,828	369,828

TY 2012 Investments - Other Schedule

Name: CHIZEN FAMILY FOUNDATION

EIN: 26-2450509

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
GOLDMAN SACHS-GSCI	FMV	443,243	443,243
SPDR S&P 500 ETF TR	FMV		
SPDR TRUST UNIT SR 1	FMV	847,482	847,482
VANGUARD INTL EQTY INDEX	FMV	370,072	370,072

TY 2012 Other Expenses Schedule

Name: CHIZEN FAMILY FOUNDATION

EIN: 26-2450509

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
CA AG RENEWAL FEE	150			150
CA FTB FILING FEE	10			10
	7			

TY 2012 Other Increases Schedule

Name: CHIZEN FAMILY FOUNDATION

EIN: 26-2450509

Description	Amount
NET CHANGE IN UNREALIZED GAIN/LOSS	1,033,182

TY 2012 Other Professional Fees Schedule

Name: CHIZEN FAMILY FOUNDATION

EIN: 26-2450509

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	8,513			8,513
INVESTMENT ADVISORY FEES	23,716	23,716		
LEGAL FEES	525			525

TY 2012 Taxes Schedule

Name: CHIZEN FAMILY FOUNDATION

EIN: 26-2450509

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	9,871			
FOREIGN TAXES WITHHELD	5,084	5,084		