Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

▶ Do not enter Social Security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052
2013
Open to Public Inspection

For calendar year 2013 or tax year beginning August 1, 2013, and ending July 31, 20 14

Name of foundation Albert and Elaine Borchard Foundation, Inc.	A Employer identification number 95-3294377
Number and street (or P O box number if mail is not delivered to street address) 22055 Clarendon Street — Room/suite 210	B Telephone number (see instructions) 818-888-2871
City or town, state or province, country, and ZIP or foreign postal code Woodland Hills, California 91367	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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 24,328,226

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

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)*

	Line	Description	(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	39,754	1,628		
	4	Dividends and interest from securities	110,812	92,293		
	5a	Gross rents	1,795,458	1,795,458		
	b	Net rental income or (loss) 1,411,479				
	6a	Net gain or (loss) from sale of assets not on line 10	16,140			
	b	Gross sales price for all assets on line 6a 500,000				
	7	Capital gain net income (from Part IV, line 2)		16,140		
	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) retainer refund	5,000	-		
	12	**Total.** Add lines 1 through 11	1,967,164	1,905,519		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	175,000	142,765		32,235
	14	Other employee salaries and wages	27,600	22,516		5,084
	15	Pension plans, employee benefits	-	-		-
	16a	Legal fees (attach schedule) schedule 1	16,682	13,609		3,073
	b	Accounting fees (attach schedule)	-			
	c	Other professional fees (attach schedule) sch. 1.	34,500	28,145		6,355
	17	Interest	-			
	18	Taxes (attach schedule) (see instructions) sch. 1	206,327	168,322		38,005
	19	Depreciation (attach schedule) and depletion sch. 3	32,926	32,926		
	20	Occupancy	24,175	19,722		4,453
	21	Travel, conferences, and meetings	10,697	8,727		1,970
	22	Printing and publications	-			
	23	Other expenses (attach schedule) schedule 1	265,086	169,079		96,007
	24	**Total operating and administrative expenses.** Add lines 13 through 23	792,993	605,811		187,182
	25	Contributions, gifts, grants paid	1,024,500			1,024,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,817,493	605,811		1,211,682
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	149,671			
	b	**Net investment income** (if negative, enter -0-)		1,299,708		
	c	**Adjusted net income** (if negative, enter -0-)				

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Part II	Balance Sheets — Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash—non-interest-bearing	20,378	87,226	87,226
	2 Savings and temporary cash investments	324,619	749,350	749,350
	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 instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Schedule 2b			
	Less: allowance for doubtful accounts ▶	50,000	50,000	50,000
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges Schedule 2a			
	10a Investments—U.S. and state government obligations (attach schedule)	983,570	499,710	546,445
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ 10,589,804			
	Less accumulated depreciation (attach schedule) ▶ 6,515,342	4,039,888	4,074,462	16,340,891
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule) Schedule 2.	4,325,329	4,436,140	4,700,514
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶ Education Center)	440,547	440,547	1,853,800
	16 **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	10,184,331	10,337,435	24,328,226
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)			
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	8,449,004	8,452,437	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	1,735,327	1,884,998	
	30 **Total net assets or fund balances** (see instructions)	10,184,331	10,337,435	
	31 **Total liabilities and net assets/fund balances** (see instructions)	10,184,331	10,337,435	

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	10,184,331
2	Enter amount from Part I, line 27a	2	149,671
3	Other increases not included in line 2 (itemize) ▶ Schedule 2c	3	5,163
4	Add lines 1, 2, and 3	4	10,339,165
5	Decreases not included in line 2 (itemize) ▶ Schedule 2d	5	1,730
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	10,337,435

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	$500,000 U S. Treasury Note			
b	due 02-15-14, 4% p.a.	P	04-24-04	02-18-14
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	500,000	-	483,860	16,140
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				
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** 16,140

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 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))
2012	1,215,780	22,214,624	0.54729
2011	1,390,298	22,251,881	0.62480
2010	1,200,896	22,052,752	0.54455
2009	1,215,942	21,834,917	0 55687
2008	1,431,274	19,635,310	0.72892

2	**Total** of line 1, column (d)	2	3.00243
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	0.60048
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	22,258,083
5	Multiply line 4 by line 3	5	1,336,553
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	12,997
7	Add lines 5 and 6	7	1,349,550
8	Enter qualifying distributions from Part XII, line 4	8	1,211,682

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 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	25,994
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	
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	
6	Credits/Payments:		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 — 6a — 26,530		
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	26,530
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	536
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ 536 **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		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		✓
	*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		✓
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		✓
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		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
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		✓
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	✓	
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	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ California			
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	✓	
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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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		✓
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		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	

Website address ▶ www.borchardfoundation.org

14 The books are in care of ▶ Heidi Galke Telephone no. ▶ 818-888-2871

Located at ▶ 22055 Clarendon Street, #210 Woodland Hills, Ca. ZIP+4 ▶ 91367-6355

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 |

			Yes	No
16	At any time during calendar year 2013, 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	✓	
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶ France			

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☑ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see 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 2013?	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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ 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 2013 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 2013.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✓
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 2013?	4b		✓

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

		Yes	No
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		✓
	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
See Schedule 4		175,000		

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	
2	
All other program-related investments See 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	5,401,332
b	Average of monthly cash balances	1b	804,816
c	Fair market value of all other assets (see instructions)	1c	16,390,891
d	**Total** (add lines 1a, b, and c)	1d	22,597,039
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	22,597,039
4	Cash deemed held for charitable activities. Enter 1 ½ % of line 3 (for greater amount, see instructions)	4	338,956
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	22,258,083
6	**Minimum investment return.** Enter 5% of line 5	6	1,112,904

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	1,112,904
2a	Tax on investment income for 2013 from Part VI, line 5	2a	25,994		
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	25,994
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	1,086,910
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	1,086,910
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	1,086,910

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	1,211,682
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,211,682
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	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,211,682

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 2012	(c) 2012	(d) 2013
1	Distributable amount for 2013 from Part XI, line 7				1,086,910
2	Undistributed income, if any, as of the end of 2013:				
a	Enter amount for 2012 only				
b	Total for prior years: 20___,20___,20___				
3	Excess distributions carryover, if any, to 2013:				
a	From 2008				
b	From 2009 134,875				
c	From 2010 119,393				
d	From 2011 286,062				
e	From 2012 129,170				
f	**Total** of lines 3a through e	669,500			
4	Qualifying distributions for 2013 from Part XII, line 4: ▶ $ 1,211,682				
a	Applied to 2012, but not more than line 2a				
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 2013 distributable amount				1,086,910
e	Remaining amount distributed out of corpus	124,772			
5	Excess distributions carryover applied to 2013 *(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	794,272			
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 2012. Subtract line 4a from line 2a. Taxable amount—see instructions				
f	Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				
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 2008 not applied on line 5 or line 7 (see instructions)				
9	**Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a	794,272			
10	Analysis of line 9:				
a	Excess from 2009 134,875				
b	Excess from 2010 119,393				
c	Excess from 2011 286,062				
d	Excess from 2012 129,170				
e	Excess from 2013 124,772				

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 2013, enter the date of the ruling . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
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 foundation 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).)

n/a

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

n/a

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 or e-mail address of the person to whom applications should be addressed:

Albert and Elaine Borchard Foundation, 22055 Clarendon Street, #210 Woodland Hills, Ca. 91367

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

see website, www.borchardfoundation.org

c Any submission deadlines:

April 1, and October 1

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

No grants to individuals

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 schedule 5				1,024,500
Total . . . . ▶ **3a**				1,024,500
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions.)
1 Program service revenue:					
a					
b					
c		not	applicable		
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					
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					
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)					

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

(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.)
	not applicable

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)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

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) is based on all information of which preparer has any knowledge

Edward D Spurgeon 11/24/14 President

Signature of officer or trustee Date Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no	

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2014
Tax ID No. 95-3294377

SCHEDULE 1

	AMOUNT
LEGAL FEES	
Smith Trager PC Legal fees re environmental issues at 1805/ 1811/1899 Sacramento Street, Los Angeles, California	$ 16,682.00
TOTAL LEGAL FEES:	$ 16,682.00
OTHER PROFESSIONAL FEES	
HEIDI GALKE administrative services	$ 10,500.00
MARY JANE CICCARELLO professional services to 07-31-14 re Center on Law and Aging	18,000.00
CATHERYN KOSS professional services to 07-31-14 re Center on Law and Aging	6,000.00
TOTAL OTHER PROFESSIONAL FEES:	**$ 34,500.00**
TAXES	
LOS ANGELES COUNTY TAX COLLECTOR - 2013/2014 real property taxes	$ 186,584.85

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-2014
Tax ID No. 95-3294377

	AMOUNT
OFFICE OF FINANCE, CITY OF LOS ANGELES	
business tax renewal for rental properties for 2014	$ 2,281.14
Estimated excise tax for fiscal year ended 07-31-14	15,000.00
Employer social security/Fica taxes/State unemployment	2,461.40
TOTAL TAXES:	**$206,327.39**

OTHER EXPENSES

The Gas Co. – 1104 S. Lawrence	452.72
Property insurance	97,898.88
Workers compensation insurance	530.00
Miscellaneous office expenses (telephone,internet, storage, Federal express, supplies, website, bank charges, postage, filing fees, etc.)	10,573.28
Education Center operating expenses, conference expenses	48,727.82
Center on Law & Aging operating expenses	9,102.90
PayChex fees re payroll	1,038.58
Cushman & Wakefield balance of commission re lease renewal for 1900 Sacramento Street, Los Angeles	33,372.48
The Klabin Company – balance of broker's commission re lease renewal for 1900 Sacramento Street, Los Angeles	50,058.72
City of Los Angeles Building & Safety – elevator inspection fees – 1900 Sacramento Street	230.04
Anderson Environmental – soil and soil vapor sampling – geophysical Survey – 1805/1811/1899 Sacramento Street	10,600.00
Iris Environmental – Phase I report re environmental issues at 1805/1811/1899 Sacramento Street	2,500.00
TOTAL OTHER EXPENSES:	**$ 265,085.42**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED 07-31-2014
Tax ID No. 95-3294377

SCHEDULE 2

OTHER INVESTMENTS

	COST	MARKET VALUE
10,373.314 shares VANGUARD TOTAL STOCK MARKET INDEX FUND – Admiral	$ 284,075.08	$ 503,624.39
$ 50,000 WELLS FARGO NOTE MED. TERM 2.25% DUE 10-19-2020	$ 50,000.00	$ 46,692.00
10,068.805 shares VANGUARD INTERMEDIATE TERM TREASURY FUND	$ 111,468.54	$ 113,173.37
175,316.418 shares VANGUARD GNMA FUND-Admiral	$ 1,835,051.55	$ 1,868,873.02
24,667.839 shares VANGUARD INFLATION PROTECTED SEC. FUND – Admiral	$ 611,604.42	$ 659,124.66
120,837.325 shares VANGUARD SHORT-TERM INVESTMENT GRADE FUND-Admiral	$ 1,287,748.78	$ 1,297,792.87
11,417.169 shares VANGUARD LONG-TERM INVESTMENT GRADE FUND-Admiral	$ 117,250.64	$ 119,537.76
4,532.694 shares IVY GLOBAL NATURAL RESOURCES FUND CL.A	$ 138,940.73	$ 91,696.39
TOTAL OTHER INVESTMENTS:	**$ 4,436,139.74**	**$ 4,700,514.46**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED JULY 31, 2014
Tax ID No. 95-3294377

SCHEDULE 2a

U.S. TREASURY NOTES	ADJUSTED COST	MARKET VALUE
$ 200,000 face value U.S. Treasury Note due 08-15-2019, 3.625% p.a.	$ 203,460.00	$ 218,578.00
$ 300,000 face value U.S. Treasury Note due 08-15-2019, 3.625% p.a.	$ 296,250.00	$ 327,867.00
TOTAL U.S. TREASURY NOTES:	$ 499,710.00	$ 546,445.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2014
TAX ID No. 95-3294377

SCHEDULE 2b

NOTE	AMOUNT
$ 50,000 Promissory Note of Green Fresh Logistics, Inc. and Carlos Monicco,(formerly TLC), dated August 14, 2013, 3% p.a., principal and interest payable at $ 482.80 per month, commencing 01-01-14, due 12-31-2023	$ 50,000.00

(this represents reduced deferred rent for 1899 Sacramento Street, Los Angeles, California)

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2014

SCHEDULE 2c

PART III – LINE 3

OTHER INCREASES

	AMOUNT
Security deposits	5,163
TOTAL OTHER INCREASES:	$ 5,163

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2014

SCHEDULE 2d

PART III – LINE 5

OTHER DECREASES

	AMOUNT
Unrealized loss due to exchange rate Euro dollar to U.S. $ as of July 31, 2014	$ 1,730
TOTAL OTHER DECREASES:	$ 1,730

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED 07-31-2014
TAX ID NO. 95-3294377

SCHEDULE 3 - DEPRECIATION

Description	Acquired	Cost	Deprec. Base	Deprec. Prior Yrs	Remaining Cost	Deprec. This Year
Fax Sharp UX120	06-04-94	847	847	847	-	-
Office fixt.	various	13,603	13,603	13,603	-	-
1805/1811 Sacramento	03-31-86	706,281	378,226	378,226	-	-
1805 Sacr.- light fixtures	04-07-97	5,620	5,620	5,620	-	-
1899 Sacramento	03-31-86	690,770	457,884	457,884	-	-
1900 Sacramento	03-31-86	3,241,790	1,947,460	1,947,460	-	-
railroad spur – 1900 Sacramento	03-31-86	30,033	-	-	-	-
1101-1131 Mateo St.	03-31-86	2,491,650	1,386,956	1,386,956	-	-
roof-Mateo	03-31-86	43,040	43,040	43,040	-	-
refrigeration equipment – Mateo St.	07-31-96	38,000	38,000	38,000	-	-
1104 Lawrence Street	03-31-86	1,060,000	1,060,000	1,060,000	-	-
roof – 1900 Sacramento Street	05-20-92	160,563	160,563	160,563	-	-
various improvements to 1900 Sacr. & parking lot	1995	332,828 less34,363= 298,465	298,465	298,465	-	-
Lot 8th & Wilson	08-11-93	589,518	-	-	-	-
Lot 8th & Lemon	01-07-97	94,919	-	-	-	-

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL YEAR ENDED 07-31-2014
TAX ID NO. 95-3294377

Description	Acquired	Cost	Deprec. Base	Deprec. Prior Yrs.	Remaining Cost	Deprec. This Year
Fence for 8th & Lemon	12-26-98	5,975	5,975	5,975	-	-
Construct. costs re seismic retrofit of bldgs at 1805/11/99 Sacramento & 1104 Lawrence/1101-1131 Mateo St.	1996/97/98	194,952	194,952	194,952	-	-
new roof at 1104 Lawrence	1998	55,881	55,881	55,881	-	-
new roof at 1102 Lawrence	04-07-09	14,450	14,450	4,815	9,635	963
new roof at 1101-1131 Mateo	1998/99	121,182	121,182	121,182	-	-
new roof at 1805 Sacramento	03-31-99	18,876	18,876	18,876	-	-
new roof at 1811 Sacramento	03-24-00	30,206	30,206	28,196	2,010	2,010
new roof at 1899 Sacramento	06-30-03	45,592	45,592	33,429	12,163	3,039
new asphalt paving – Mateo	09-24-99	24,500	24,500	22,862	1,638	1,638
new asphalt paving – 1805/11 Sacramento	02-05-01	24,123	24,123	20,904	3,219	1,608
rolling steel doors – 1805 Sacramento	06-01-01	9,931	9,931	9,931	-	-

Description	Acquired	Cost	Deprec. Base	Deprec. Prior Years	Remaining Cost	Deprec. This Year
heat/aircond. unit 1102 Lawrence	01-22-01	6,200	6,200	6,200	-	-
heat/aircond. unit 1104 Lawrence, 2nd Fl.	03-04-02	5,250	5,250	5,250	-	-
Filing Cabinets	06-02-09	3,589	3,589	3,589	-	-
1811 Sacramento Two new heavy duty steel roll-up doors	07-14-12	12,800	12,800	2,730	10,070	2,517
new office/bath – 1805 Sacramento	08-20-01	14,894	14,894	11,916	2,978	993
new asphalt job-parking lot 1104 Lawrence	11-28-03	62,134	62,134	41,420	20,714	4,142
1900 Sacramento tenant improvements	12-30-04 and various	100,000	100,000	60,003	39,997	6,667
add'l improvements	2014	67,500	67,500	-	67,500	4,500
1900 Sacramento – 6,684 sq. ft. acqd.-driveway property	06-01-07	**233,940**	-	-	-	-
Asphalt paving	01-26-05	**72,730**	72,730	43,641	29,089	4,849
TOTALS:		**10,589,804**	-	**6,482,416**		**32,926**

Albert & Elaine Borchard Foundation – Fiscal 07-31-2014 – Tax ID No. 95-3294377

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
FISCAL TAX YEAR ENDED 07-31-2014
Tax ID No. 95-3294377

SCHEDULE 4

ATTACHMENT TO PART VIII, LINE 1

NAME AND ADDRESS	TITLE	TIME	COMPENSATION
Edward D. Spurgeon c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director/ President	part- time	$ 30,500
Janna Beling c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director, Exec. Vice President	part- time	$ 38,000
Kristen Beling c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director	part- time	$ 24,000
Michael Spurgeon c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, California 91367	Director	part- time	$ 19,000
Stephen Spurgeon c/o Foundation Office 22055 Clarendon St., # 210 Woodland Hills, Ca. 91367	Director	part- time	$ 14,000
Heidi Galke c/o Foundation office 22055 Clarendon St., # 210 Woodland Hills, Ca. 91367	Director, secretary, Chief financial officer	part- time	$ 49,500
TOTAL LINE 1 PART VIII			**$ 175,000**

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-14
Tax ID No. 95-3294377

SCHEDULE 5

	GRANTS		AMOUNT
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (UC - IRVINE) 1400 Biological Science III Irvine, California 92697-1050		
08/12/13	grant in support of research by Prof. Susan C. Jarratt scholar in residence - fall semester 2013 at Education Center, France	$	30,000.00
	Disbursed to UNION RESCUE MISSION 545 S. San Pedro Mission Los Angeles, California 90013		
11/21/13	grant to help feed the homeless and hungry for Thanksgiving and Christmas		5,000.00
	Disbursed to LOS ANGELES MISSION 303 East 5th Street Los Angeles, California 90013		
11/21/13	grant to help feed the homeless and hungry		5,000.00
	Disbursed to PET ADOPTION FUND 7515 Deering Avenue Canoga Park, California 91303		
11/21/13	grant to help abused and abandoned animals to be adopted		5,000.00
	Disbursed to THE MIDNIGHT MISSION 601 South San Pedro Street Los Angeles, California 90014		
11/21/13	grant for 2013 Meal Services for Homeless program		10,000.00

	GRANTS		AMOUNT
	Disbursed to SENIOR GLEANERS, INC. 1951 Bell Avenue Sacramento, California 95819		
11/21/13	grant for Healthy Food Initiative program	$	5,000.00
	Disbursed to FOOD FINDERS 2301 East 28th Street, Suite 303 Signa Hill, California 90755		
11/21/13	grant for Food Rescue Program		5,000.00
	Disbursed to UNION STATION HOMELESS SERVICES 825 E. Orange Grove Boulevard Pasadena, California 91104		
11/21/13	grant for general operating support		10,000.00
	Disbursed to SACRAMENTO FOOD BANK 3333 Third Avenue Sacramento, California 95817		
11/21/13	grant to help purchase 96 food bins		15,000.00
	Disbursed to ASSISTANCE LEAGUE OF VENTURA COUNTY 1381 Camden Lane Ventura, California 93001		
11/21/13	grant for "Operation School Bell" program		5,000.00
	Disbursed to NATIONAL ACADEMY OF SOCIAL INSURANCE 1776 Massachusetts Avenue, NW, Suite 400 Washington, DC 20036-1904		
11/30/13	grant for NASI-Borchard Foundation Center on Law & Aging Legal Writing Award		12,500.00

	GRANTS		AMOUNT
	Disbursed to SENIOR LAW RESOURCE CENTER P.O. Box 1408 Oklahoma City, OK 73101		
11/30/13	grant for one year pilot project in support of former Borchard Fellows Small Grant Program for ongoing work in Law & Aging	$	20,000.00
	Disbursed to SOUTHERN CENTER FOR HUMAN RIGHTS 83 Poplar Street, NW Atlanta, GA 30303		
11/30/13	grant in support of 2013 Human Rights Internship Program		10,000.00
	Disbursed to SUNNY HILLS SERVICES/BAYC 22245 Main Street, Suite 200 Hayward, California 94541		
11/30/13	first year installment of $25,000 grant for five years longitudinal study re youth exiting the traditional housing program		7,000.00
	Disbursed to VENICE FAMILY CLINIC 604 Rose Avenue Venice, California 90291		
11/30/13	grant in support of pediatrics program		7,500.00
	Disbursed to CHILDREN DENTAL CENTER OF GREATER LOS ANGELES 300 East Buckthorn Street Inglewood, California 90301		
11/30/13	grant in support of community outreach program		10,000.00

	GRANTS		AMOUNT
	Disbursed to NATIONAL MULTIPLE SCLEROSIS SOCIETY 2440 South Sepulveda Boulevard, Suite 115 Los Angeles, California 90064		
11/30/13	grant in support of Educational Scholarship Program for Youth Affected by MS	$	5,000.00
	Disbursed to EISNER PEDIATRIC & FAMILY MEDICAL CENTER 1530 South Olive Street Los Angeles, California 90015		
11/30/13	grant in support of school-based dental program		10,000.00
	Disbursed to DE LA SALLE NORTH CATHOLIC HIGH SCHOOL 7528 North Fenwick Avenue Portland, Oregon 97217		
11/30/13	grant for program to provide college-preparatory education to students from very low-income families		5,000.00
	Disbursed to STUDENT RUN AMERICA 5252 Crebs Avenue Tarzana, California 91356		
12/04/13	grant for SRLA scholarship program 2014		10,000.00
	Disbursed to LOS ANGELES CITY COLLEGE FOUNDATION 855 N. Vermont Avenue Los Angeles, California 90029		
12/04/13	grant to help purchase computers and assistive technology for students with disabilities		15,000.00

	GRANTS	AMOUNT
	Disbursed to DISCOVERY CHILDREN MUSEUM 360 Promenade Place Las Vegas, NV 89106	
12/04/13	grant to help at risk youth develop life and job skills through mentoring, educational enrichment and work readiness training in the museum setting	$ 7,500.00
	Disbursed to NETWORK FOR TEACHING ENTREPRENEURSHIP Greater Los Angeles 350 S. Bixel Street, Suite 280 Los Angeles, California 90017	
12/04/13	grant in support of Los Angeles Schools Entrepreneurship Initiative	5,000.00
	Disbursed to FUND FOR MUSIC 300 East Green Street, 3rd Floor Pasadena, California 91101	
12/04/13	grant in support of Kids/Ique Musical Immersion Program for Foster Youth	10,000.00
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (U.C.S.B.) University of California Santa Barbara, California 93106-4140	
12/04/13	grant for 2014 International Conference on "Urban Mysteries"	15,000.00
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (U.C. - IRVINE) 1400 Biological Science III Irvine, California 92697-1050	
12/04/13	grant for research by Prof. Anthony D. Long as scholar-in-residence at International Education Center, Spring semester 2014	30,000.00

Date	GRANTS		AMOUNT
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (U.C.S.B.) Michael Douglas Dean of Humanities and Fine Arts University of California Santa Barbara, California 93106-2080		
12/09/13	grant for Borchard Foundation European Studies Fellowship for academic year 2013/14	$	20,000.00
	Disbursed to CALIFORNIA STATE UNIVERSITY, NORTHRIDGE Department of Physical Therapy 18111 Nordhoff Street Northridge, California 91330-8411		
12/13/13	2nd installment of $30,000 re physical therapy students enrolled in PT 7857		10,000.00
	Disbursed to THE POETRY INC. 1719 25th Street Sacramento, California 95816		
12/13/13	2nd annual installment of grant in support of programs - 2014		7,500.00
	Disbursed to LOS RIOS FOUNDATION American River College 4700 College Oak Drive Sacramento, California 95841		
01/04/14	grant for Summer Words 2014 project		25,000.00
	Disbursed to HEALTH VOLUNTEERS OVERSEAS 1900 L Street, NW, Suite 310 Washington, DC 20036		
01/04/14	grant in support of HVO Evaluation & Metrics Project, Phase II		24,000.00

	GRANTS		AMOUNT
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA VKC 351 3501 Trousdale Parkway University Park Los Angeles, California 90089-0354		
01/04/14	grant for 2014/15 Borchard Overseas Dissertation Research Fellowship	$	12,500.00
	Disbursed to THE CENTER FOR SOCIAL GERONTOLOGY 2307 Shelby Avenue Ann Arbor, Michigan 48103		
01/19/14	research grant for Lauren Lisi and Penelope Hommel on project "National Study of Statewide Reporting Practices for Title III-B Legal Services, etc."		17,500.00
	Disbursed to UNIVERSITY OF MASSACHUSETTS FOUNDATION 100 Morrissey Boulevard Boston, Massachusetts 02111		
02/24/14	research grant for Prof. Jan Mutchler, et al on project "Bridging Aging and Disability: The Role of Disability Resource Centers in Serving Adults Aging with Intellectual Disabilities and Their Family Caregivers"		20,000.00
	Disbursed to THE POET TREE INC. (Sacramento Poetry Center) 1719 25th Street Sacramento, California 95816		
02/24/14	capacity building grant for 916 Ink in support of 2014 position of an executive director		25,000.00

	GRANTS		AMOUNT
	Disbursed to NATIONAL CONSUMER LAW CENTER Seven Winthrop Square Boston, MA 02110-1245		
03/09/14	research grant for Diane E. Thompson on project "The Need for Mortgage Modifications When A Spouse or Long-Term Partner Dies"	$	15,000.00
	Disbursed to SYRACUSE UNIVERSITY School of Law Syracuse, NY 13244		
04/14/14	research grant for Prof. Nina A. Kohn and Israel Doron on "Connecting Elder Law and Gerontology"		12,500.00
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (IRVINE) 5171 California Avenue #150 Irvine, California 92697-7600		
05/05/14	grant for conference on "Endogenous Retroviruses and their Nomenclature" 6-22 to 6-25-14 at Education Center, Missillac		35,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Sponsored Projects Accounting 3500 Figueroa Street, UGB 102 Los Angeles, California 90089-8001		
05/05/14	grant for conference on "Probability and Statistics Honoring Paul Malliavin 6-29 to 7-2-14 at Education Center, Missillac		35,000.00

Date	GRANTS		AMOUNT
	Disbursed to REGENTS OF THE UNIVERSITY OF CALIFORNIA (IRVINE) Accounting Department 1400 Biological Science III, Suite 1400 Irvine, California 92697-1050		
05/05/14	grant for conference on "What Have We Learned Since the Fall of the Berlin Wall" 7-6 to 7-9-14 at Education Center, Missillac	$	35,000.00
	Disbursed to UNIVERSITY OF SOUTHERN CALIFORNIA Thornton School of Music 840 W. 34th Street MUS 408D Los Angeles, California 90026		
05/05/14	grant for Performing Arts Workshop - Peter Marsh 8-15 to 8-20-14 at Education Center, Missillac		40,000.00
	Disbursed to DOWNTOWN WOMEN'S CENTER 442 S. San Pedro Street Los Angeles, California 90013		
05/28/14	grant for 2014 Meals Program, staffing and materials costs		5,000.00
	Disbursed to FOOD SHARE 4156 Southbank Road Oxnard, California 93036		
05/28/14	grant for emergency food distribution in Ventura County		10,000.00
	Disbursed to MEND 10641 N. San Fernando Road Pacoima, California 91331		
05/28/14	grant in support of food bank		5,000.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-14
Tax ID No. 95-3294377

	GRANTS		AMOUNT
	Disbursed to NEVADA PARTNERSHIP FOR HOMELESS YOUTH P.O. Box 20135 Las Vegas, NV 89112		
05/28/14	grant for William Fry Drop - In Center	$	10,000.00
	Disbursed to SOUTHERN CENTER FOR HUMAN RIGHTS 83 Poplar Street, NW Atlanta, GA 30303		
05/28/14	grant for 2014 Human Rights Internship		10,000.00
	Disbursed to EDUCATION THROUGH MUSIC-LOS ANGELES 847 N. Hollywood Way, Suite 206 Burbank, California 91505		
05/28/14	grant for In-School Music Education Program		5,000.00
	Disbursed to THE COLBURN SCHOOL 200 South Grand Avenue Los Angeles, California 90012		
05/28/14	grant for need-based scholarships for low income students in the community school of Performing Arts		5,000.00
	Disbursed to VILLANOVA UNIVERSITY University Advancement 800 Lancaster Avenue Villanova, PA 19085		
05/28/14	grant for PSK-Billy Zimmerman Fund		10,000.00

	GRANTS		AMOUNT
	Disbursed to PILGRIM PLACE IN CLAREMONT Napier Initiative 625 Mayflower Road Claremont, California 91711		
05/28/14	grant for one Napier award in support of Humanitarian and Environmental projects	$	10,000.00
	Disbursed to STRIVE FOUNDATION 9124 S. Main Street Los Angeles, California 90003		
05/28/14	grant in support of programs		5,000.00
	Disbursed to CASA OF LOS ANGELES 201 Centre Plaza Drive, Suite 1100 Monterey Park, California 91754-2142		
05/28/14	grant in support of Transition Age Program		10,000.00
	Disbursed to WEST VALLEY BOYS & GIRLS CLUB 7245 Remmet Avenue Canoga Park, California 91303		
05/28/14	grant to help with services to the youth in the West Valley		5,000.00
	Disbursed to UMMA COMMUNITY CLINIC 5849 Crocker Street, Unit K Los Angeles, California 90003		
05/28/14	grant for "Promoting a Healthy Los Angeles through Primary and Preventive Care"		10,000.00

ALBERT AND ELAINE BORCHARD FOUNDATION, INC.
Fiscal Tax Year Ended 07-31-14
Tax ID No. 95-3294377

Date	GRANTS	AMOUNT
	Disbursed to ST. BARNABAS SENIOR SERVICES 675 S. Carondelet Street Los Angeles, California 90057-3309	
05/28/14	grant to help sustain and strengthen the Case Management Program $	5,000.00
	Disbursed to PET ADOPTION FUND 7515 Deering Avenue Canoga Park, California 91303	
05/28/14	grant to help abused and abandoned animals to be adopted	2,500.00
	Disbursed to LOS ANGELES MISSION 303 East 5th Street Los Angeles, California 90013	
05/28/14	grant to help feed the homeless and hungry in Los Angeles	5,000.00
	Disbursed to UNION RESCUE MISSION 545 S. San Pedro Mission Los Angeles, California 90013	
05/28/14	grant to help feed the homeless and hungry in Los Angeles	5,000.00
	Disbursed to JUNIOR BLIND OF AMERICA 5300 Angeles Vista Boulevard Los Angeles, California 90043	
05/28/14	grant to enable low income blind, visually impaired to attend Camp Bloomfield in 2014	7,500.00
	Disbursed to RESCUE MISSION ALLIANCE P.O. Box 5545 Oxnard, California 93031-5545	
05/28/14	grant for Valley Food Bank's program "Fighting Hunger-Feeding Hope"	15,000.00

	GRANTS		AMOUNT
	Disbursed to NEVADA BALLET THEATRE 1651 Inner Circle Las Vegas, NV 89134		
05/28/14	grant to underwrite "The Nutcracker" school matinee performances	$	17,000.00
	Disbursed to BIENVENIDOS CHILDREN'S CENTER, INC. 316 West 2nd Street, Suite 800 Los Angeles, California 90012		
05/28/14	grant for three school-based health centers		10,000.00
	Disbursed to HEAR CENTER 301 E. Del Mar Boulevard Pasadena, California 91101		
05/28/14	grant in support of Community Access Center		10,000.00
	Disbursed to OREGON HEALTH & SCIENCE UNIVERSITY 3181 SW Sam Jackson Park Road Portland, Oregon 97239		
05/28/14	grant for next Head & Neck Cancer Awareness & Free Screening Day		6,500.00
	Disbursed to PLANNED PARENTHOOD - LOS ANGELES 400 West 30th Street Los Angeles, California 90007		
05/28/14	grant for community education & outreach programs		10,000.00
	Disbursed to SPECIAL NEEDS NETWORK, INC. 4401 Crenshaw Boulevard, Suite 215 Los Angeles, California 90043		
05/28/14	grant for core operating support to strengthen organizational administrative & programmatic needs		10,000.00

	GRANTS		AMOUNT
	Disbursed to LEUKEMIA & LYMPHOMA SOCIETY, GREATER LOS ANGELES 6033 W. Century Boulevard, Suite 300 Los Angeles, California 90045		
05/28/14	grant for patient transportation assistance program	$	10,000.00
	Disbursed to ABA JUSTICE AND EDUCATION FUND Commission on Law and Aging 740 15th Street, NW Washington, DC 20005-1019		
05/28/14	grant for 12 month Professional Elder Law Education Initiative 07-01-14 to 06-30-15		15,000.00
	Disbursed to ABA JUSTICE AND EDUCATION FUND Commission on Law and Aging 740 15th Street, NW Washington, DC 20005-1019		
05/28/14	grant for 2014 National Aging and Law Conference 10-16/17-2014 in Washington DC		15,000.00
	Disbursed to ABA JUSTICE AND EDUCATION FUND Commission on Law and Aging 740 15th Street, NW Washington, DC 20005-1019		
05/28/14	grant for 12 month project "WINGS"		10,000.00
	Disbursed to NATIONAL SENIOR CITIZENS LAW CENTER 1330 Broadway, Suite 525 Oakland, California 94612		
05/28/14	grant for new strategic education and training project per proposal dated 05-02-14		15,000.00

	GRANTS		AMOUNT
	Disbursed to NATIONAL SENIOR CITIZENS LAW CENTER 1330 Broadway, Suite 525 Oakland, California 94612		
05/28/14	grant to implement new brand identity to grow NSCLC impact	$	20,000.00
	Disbursed to LEGAL ASSISTANCE FOR SENIORS 1970 Broadway, Suite 300 Oakland, California 94612		
07/21/14	fellowship grant for Brandy DeOrnellas for 2014/2015 academic year		42,500.00
	Disbursed to GREATER BOSTON LEGAL SERVICES 197 Friend Street Boston, Massachusetts 02114		
07/21/14	fellowship grant for Sheila Gholkar for 2014/2015 academic year		42,500.00
	Disbursed to NEW YORK LEGAL ASSISTANCE GROUP 7 Hanover Square New York, NY 10004		
07/21/14	fellowship grant for Peter Travitsky for academic year 2014/2015		42,500.00
	TOTAL GRANTS:	$	1,024,500.00