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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052





2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014 , and ending 12-31-2014

Name of foundation THE HENRY MAYO NEWHALL FOUNDATION C/O KRAMER BLUM AND ASSOCIATES INC		A Employer identification number 94-6073084	
Number and street (or P O box number if mail is not delivered to street address) 57 POST STREET NO 510		B Telephone number (see instructions) (415) 981-2966	
City or town, state or province, country, and ZIP or foreign postal code SAN FRANCISCO, CA 94104		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 42,122,867		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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)	2,193			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	55	55		
	4 Dividends and interest from securities.	1,056,798	1,056,798		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,756,922			
	b Gross sales price for all assets on line 6a 12,070,330				
	7 Capital gain net income (from Part IV, line 2) . . .		1,756,922		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	2,815,968	2,813,775		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	31,917	13,438		18,479
	c Other professional fees (attach schedule)	348,765	199,501		149,264
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	5,285	285		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	18,701	0		18,701
	22 Printing and publications				
	23 Other expenses (attach schedule)	7,286	139		7,147
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	411,954	213,363		193,591
	25 Contributions, gifts, grants paid	2,028,170			2,028,170
	26 Total expenses and disbursements. Add lines 24 and 25	2,440,124	213,363		2,221,761
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	375,844			
	b Net investment income (if negative, enter -0-)		2,600,412		
	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			
	2	Savings and temporary cash investments	235,690	463,664	463,664
	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) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)	1,882,972	 1,067,267	1,080,775
	b	Investments—corporate stock (attach schedule)	10,925,218	 11,880,262	20,712,063
	c	Investments—corporate bonds (attach schedule).	4,361,731	 7,432,909	7,541,054
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	13,496,385	 10,433,738	12,325,311
	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)	30,901,996	31,277,840	42,122,867	
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	0	
	Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
24		Unrestricted	30,901,996	31,277,840	
25		Temporarily restricted			
26		Permanently restricted			
Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.					
27		Capital stock, trust principal, or current funds			
28		Paid-in or capital surplus, or land, bldg , and equipment fund			
29		Retained earnings, accumulated income, endowment, or other funds			
30		Total net assets or fund balances (see instructions)	30,901,996	31,277,840	
31		Total liabilities and net assets/fund balances (see instructions) . . .	30,901,996	31,277,840	

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 30,901,996
2	Enter amount from Part I, line 27a	2 375,844
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 31,277,840
5	Decreases not included in line 2 (itemize) ▶ _____	5 0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 31,277,840

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			(I) 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	1,756,922
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 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))
2013	2,120,348	38,376,276	0 055252
2012	1,982,617	36,306,309	0 054608
2011	1,886,066	36,059,538	0 052304
2010	1,411,947	33,713,846	0 041880
2009	1,662,460	30,736,464	0 054088

2	Total of line 1, column (d).	2	0 258132
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 051626
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	41,214,465
5	Multiply line 4 by line 3.	5	2,127,738
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	26,004
7	Add lines 5 and 6.	7	2,153,742
8	Enter qualifying distributions from Part XII, line 4.	8	2,221,761

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

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

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	26,004
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	0
3		Add lines 1 and 2.		3	26,004
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	26,004
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	28,370	
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	28,370
8		Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	2,366
11		Enter the amount of line 10 to be Credited to 2015 estimated tax 2,366 Refunded		11	0

Part VII-AStatements Regarding Activities

1a		During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		1a		No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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 \$ 0 (2) On foundation managers \$ 0				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		No
		If "Yes," attach a detailed description of the activities.				
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year?		4b		
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		No
		If "Yes," attach the statement required by General Instruction T.				
6		Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either				
		• 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 2014 or the taxable year beginning in 2014 (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 ▶ WWW.NEWHALLFOUNDATION.ORG				
14	The books are in care of ▶ KRAMER BLUM AND ASSOCIATES INC Telephone no ▶ (415) 981-2966 Located at ▶ 57 POST STREET SAN FRANCISCO CA ZIP +4 ▶ 94104			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2014, 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	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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. ▶ <input type="checkbox"/>			
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 2014?. 1c			No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is 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?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i>). 3b			
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 5a(1)–(5), did 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?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	
If "Yes," attach the statement required by Regulations section 53.4945–5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		No
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
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.				0

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
ATLANTIC TRUST PRIVATE WEALTH MANAGEMENT	INVESTMENT MANAGEMENT	199,501
4675 MAC ARTHUR COURT SUITE 1150 NEWPORT BEACH,CA 92660		
KRAMERBLUM AND ASSOCIATIONS	FINANCIAL MANAGEMENT	148,574
57 POST STREET SAN FRANCISCO,CA 94104		
Total number of others receiving over \$50,000 for professional services.		0

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 ▶	0

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	41,038,051
b	Average of monthly cash balances.	1b	804,045
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	41,842,096
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	41,842,096
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	627,631
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	41,214,465
6	Minimum investment return. Enter 5% of line 5.	6	2,060,723

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	2,060,723
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	26,004
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	26,004
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	2,034,719
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,034,719
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	2,034,719


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	2,221,761
b	Program-related investments—total from Part IX-B.	1b	0
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	2,221,761
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	26,004
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,195,757
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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				2,034,719
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			0	
b Total for prior years 20__ , 20__ , 20__		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				147,347
b From 2010.				
c From 2011.				125,779
d From 2012.				208,474
e From 2013.				241,444
f Total of lines 3a through e.	723,044			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 2,221,761				
a Applied to 2013, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	 0			
d Applied to 2014 distributable amount.				2,034,719
e Remaining amount distributed out of corpus	187,042			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	910,086			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
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.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . .	147,347			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	762,739			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				125,779
c Excess from 2012. . . .				208,474
d Excess from 2013. . . .				241,444
e Excess from 2014. . . .				187,042

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, 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)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2014	(b) 2013	(c) 2012	(d) 2011	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

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

THE HENRY MAYO NEWHALL FOUNDATION C

57 POST STREET

SAN FRANCISCO,CA 94104

(415) 986-2966

b

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

PROPOSALS SHOULD INCLUDE A DESCRIPTION OF THE CHARITY, THE AMOUNT OF THE REQUEST, AND A WRITTEN DESCRIPTION OF THE PROJECT WITH BUDGET THE CHARITY'S ANNUAL RETURN AND TAX EXEMPT PAPERWORK SHOULD BE INCLUDED WITH THE REQUEST

c

Any submission deadlines

NONE

d

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

NONE

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

Form **990-PF** (2014)

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)

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)
CHARLES SCHWAB CAPITAL GAINS DISTRIBUTION	P	2014-12-31	2014-12-31
84 SHS GOOGLE INC	P	2012-02-01	2014-01-03
5,824 112 SHS LAZARD EMERGING MARKETS	P	2012-03-09	2014-01-27
780 SHS UNITED TECHNOLOGIES CORP	P	2012-02-02	2014-02-16
333 327 SHS YACKTMAN FOCUSED FUND	P	2014-02-11	2014-02-11
8,825 02 SHS YACKTMAN FOCUSED FUND	P	2013-01-01	2014-02-11
6,910 SHS KINDER MORGAN INC	P	2012-10-12	2014-02-26
1,290 SHS FISERV	P	2012-11-09	2014-02-28
6,601 SHS REPUBLIC SVCS INC	P	2011-11-23	2014-03-17
2,205 SHS ORACLE CORPORATION	P	2013-01-01	2014-04-01

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)
62,394			62,394
93,070		48,057	45,013
99,950		115,046	-15,096
84,591		62,597	21,994
8,218		8,343	-125
217,577		172,115	45,462
222,225		232,058	-9,833
74,857		31,138	43,719
222,782		180,887	41,895
91,612		54,956	36,656

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	
			62,394
			45,013
			-15,096
			21,994
			-125
			45,462
			-9,833
			43,719
			41,895
			36,656

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)
4,015 SHS PG&E	P	2012-02-15	2014-04-14
475,000 SHS FEDERAL NATIONAL MTG 5 375%	P	2013-01-01	2014-05-02
200,000 SHS US TREASURY NOTE 4 25%	P	2009-09-18	2014-05-02
300,000 SHS US TREASURY NOTE 5 125%	P	2010-08-24	2014-05-02
100,000 SHS BERKSHIRE HATHAWAY FIN CORP	P	2013-01-01	2014-05-02
363,991 735 SHS FRNAKLIN HIGH INCOME FUND	P	2012-01-26	2014-05-02
1,180 SHS DIRECTV	P	2013-03-12	2014-05-06
973 627 SHS LAZARD EMERGING MARKETS EQUITY	P	2012-03-09	2014-05-12
19,618 233 SHS LAZARD EMERGING MARKETS EQUITY	P	2012-03-09	2014-05-12
13,614 704 SHS BOSTON TRUST SMALL CAP	P	2009-08-13	2014-05-21

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)
178,985		166,750	12,235
539,216		567,403	-28,187
210,498		217,285	-6,787
328,498		357,026	-28,528
114,360		114,965	-605
778,892		710,035	68,857
96,657		58,173	38,484
18,604		18,129	475
374,857		389,566	-14,709
200,000		158,551	41,449

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	
			12,235
			-28,187
			-6,787
			-28,528
			-605
			68,857
			38,484
			475
			-14,709
			41,449

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)
2,535 SHS MCDONALDS CORP	P	2013-01-01	2014-05-29
400,000 SHS JP MORGAN CHASE & CO 4 65%	P	2011-10-21	2014-06-01
150,000 SHS HEWLETT PACKARD CO 4 75%	P	2010-07-01	2014-06-01
775 SHS WASHINGTON PRIME GROUP INC	P	2013-09-19	2014-06-11
7,290 SHS FREEPORT-MCMORAN COPPER & GOLD	P	2013-02-27	2014-06-20
1,350 SHS AETNA INC	P	2012-11-19	2014-07-23
62,896 275 SHS BOSTON TRUST SMALL CAP	P	2013-01-01	2014-08-08
280 SHS TARGET CORP	P	2011-03-11	2014-08-11
3,690 SHS WALGREEN CO	P	2013-01-01	2014-08-11
4,5,699 273 SHS JOHN HANCOCK FUNDS II	P	2013-06-10	2014-08-13

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)
258,823		198,412	60,411
398,494		419,648	-21,154
150,000		166,682	-16,682
14,840		14,725	115
252,527		243,332	9,195
114,203		56,045	58,158
934,639		648,008	286,631
16,087		14,542	1,545
223,471		114,816	108,655
514,067		500,000	14,067

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	
			60,411
			-21,154
			-16,682
			115
			9,195
			58,158
			286,631
			1,545
			108,655
			14,067

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)
14,589 316 SHS MAINSTAY MARKET FUND CLASS I	P	2013-06-10	2014-08-13
1,735 SHS DISNEY WALT CO	P	2013-08-08	2014-08-29
2,390 SHS CROWN HOLDINGS	P	2012-01-17	2014-09-05
100,902 461 SHS RIDGEWORTH SEIX FLOAT	P	2013-08-29	2014-10-01
15,951 619 SHS AMG TIMESSQUARE MID CAP	P	2012-12-26	2014-10-01
8,030 SHS ISHARES RUSSELL GROWTH MIDCAP	P	2013-08-30	2014-10-06
6,960 SHS VANGUARD TOTAL STOCK MKT	P	2013-07-25	2014-10-06
2,795 SHS KELLOGG CO	P	2013-09-19	2014-10-07
3,410 SHS NETAPP INC	P	2012-04-25	2014-10-07
14,667 559 SHS MAINSTAY MARKETFIELD FD CLASS I	P	2013-06-10	2014-10-09

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)
254,000		249,331	4,669
156,720		114,266	42,454
119,535		86,804	32,731
900,000		910,264	-10,264
300,000		177,190	122,810
702,681		600,091	102,590
699,939		608,181	91,758
169,101		170,575	-1,474
136,329		128,267	8,062
244,948		250,669	-5,721

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	
			4,669
			42,454
			32,731
			-10,264
			122,810
			102,590
			91,758
			-1,474
			8,062
			-5,721

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)
13,730 SHS JP MORGAN CHASE & CO	P	2012-04-23	2014-10-17
1,761 SHS CDK GLOBAL INC	P	2010-01-12	2014-10-24
3,720 SHS CROWN HOLDINGS INC	P	2012-06-06	2014-10-27
658 SHS AVALONBAY CMNTYS INC REIT	P	2013-09-19	2014-10-27
950 SHS UNION PACIFIC CORP	P	2013-09-09	2014-11-05
1,020 SHS APPLE INC	D	2008-12-19	2014-07-02
3,625 SHS TARGET CORP	D	2008-12-19	2014-08-11
1,310 SHS APPLE INC	D	2008-12-19	2014-09-05

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)
624,418		500,692	123,726
49,336		28,237	21,099
175,659		126,131	49,528
99,166		92,293	6,873
110,434		76,398	34,036
95,173		13,114	82,059
208,265		124,772	83,493
129,632		16,843	112,789


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	
			123,726
			21,099
			49,528
			6,873
			34,036
			82,059
			83,493
			112,789


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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DAVID S NEWHALL	PRESIDENT / DIRECTOR 1 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
ANGELICA C SIMMONS	VICE PRESIDENT / DIRECTOR 1 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
ROGER B NEWHALL	TREASURER / DIRECTOR 1 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
ANTHONY NEWHALL	DIRECTOR 1 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
SCOTT DUNHAM	SECRETARY / TREASURER 1 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
CAROLINE CONROY	DIRECTOR 1 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
FRANCINE WOODS	DIRECTOR 1 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
MARION HILL	DIRECTOR 0 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
PRUDENCE J NOON	DIRECTOR 0 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
GEORGE NEWHALL	DIRECTOR 0 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
DONNA CHESEBROUGH	DIRECTOR 0 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				
NATASHA HUNT	DIRECTOR 0 00	0	0	0
57 POST STREET SUITE 510 SAN FRANCISCO, CA 94104				


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AAUW SANTA CLARITA VALLEY BRANCH PO BOX 800354 VALENCIA,CA 91380	NONE	PC	FOR THE 2014 AAUWTECH TREK CAMP FOR 6TH GRADE GIRLS	1,800
AIM HIGH PO BOX 410715 SAN FRANCISCO,CA 94141	NONE	PC	FOR THE YOUTH EMPLOYMENT INITIATIVE (MATCHING)	25,000
ALVARADO ELEMENTARY SCHOOL PTA 625 DOUGLASS STREET SAN FRANCISCO,CA 94114	NONE	PC	FOR THE AGE-APPROPRIATE SCIENCE EDUCATION PROGRAM	13,000
ANGEL ISLAND IMMIGRATION STATION FOUNDATION 5 THIRD STREET SUITE 700 SAN FRANCISCO,CA 94103	NONE	PC	FOR THE IMMIGRANT VOICES A WEST COAST DIGITAL HISTORY PROJECT	50,000
ANIMALS IN NEED FUND 525 SANDYDALE DRIVE NIPOMO,CA 93444	NONE	PC	FOR SUBSIDIZED SPAY, NEUTER AND LIFE-SAVING SURGERIES FOR ANIMALS OWNED BY LOW-INCOME FAMILIES	10,000
BETHANY CENTER FOUNDATION 580 CAPP STREET SAN FRANCISCO,CA 94110	NONE	PC	FOR RUTH'S TABLE, THE ARTS AND CULTURE PROGRAM FOR SENIORS LIVING IN THE MISSION DISTRICT (MATCHING)	20,000
BOYS & GIRLS CLUB OF SANTA CLARA VALLEY PO BOX 152 SANTA PAULA,CA 93061	NONE	PC	FOR THE FILLMORE CLUBHOUSE ART PROGRAM	8,500
BOYS & GIRLS CLUB OF SANTA CLARITA VALLEY 24909 NEWHALL AVENUE SANTA CLARITA,CA 91321	NONE	PC	FOR THE CORE YEAR-ROUND OUT-AND-AFTER SCHOOL PROGRAMS AND NEW ANTI- BULLYING PROGRAM	30,000
BRIDGE TO HOME PO BOX 802978 SANTA CLARITA,CA 93180	NONE	PC	FOR THE BRIDGE CASE MANAGEMENT AND SUPPORT SERVICES TO HELP INDIVIDUALS TRANSITION OF OUT HOMELESSNESS	25,000
CALIFORNIA HISTORICAL SOCIETY 678 MISSION STREET SAN FRANCISCO,CA 94105	NONE	PC	FOR THE PUBLIC EDUCATION PROGRAMMING TO ILLUMINATE KEY ASPECTS OF THE PANAMA-PACIFIC INTERNATIONAL EXPOSITION	50,000
CALIFORNIA POLY SAN LUIS OBISPO COLLEGE OF AGRICULTURE FOOD ENVIRONMENTAL SCIENCES SAN LUIS OBISPO,CA 93407	NONE	PC	FOR THE NEWHALL INTERNSHIP PROGRAM FOR SMV STUDENTS ENROLLED IN THE COLLEGE OF AGRICULTURE	30,000
CALIFORNIA STATE UNIVERSITY FRESNO JORDAN COLLEGE OF AGRICULTURAL SCIENCES TECHNOLOGY FRESNO,CA 93740	NONE	PC	FOR SCHOLARSHIPS AND FELLOWSHIPS FOR STUDENTS ENROLLED IN THE JORDAN COLLEGE OF AGRICULTURAL SCIENCES & TECHNOLOGY	25,000
CASA-SANTA BARBARA COUNTY 2601 SKYWAY DRIVE STE A3 SANTA MARIA,CA 93455	NONE	PC	FOR THE SANTA MARIA FOSTER YOUTH ADVOCACY PROGRAM	30,000
CATHOLIC CHARITIES OF LOS ANGELES 1531 JAMES M WOOD BLVD LOS ANGELES,CA 90015	NONE	PC	FOR THE OLDER ADULT SERVICES AND INTERVENTION SYSTEM FOR CLIENTS LIVING IN PIRU, FILLMORE AND SANTA PAULA	10,000
CENTRAL COAST AG NETWORK PO BOX 3736 SAN LUIS OBISPO,CA 93403	NONE	PC	FOR THE CITY FARM ACADEMIC/VOCATIONAL EDUCATION PROGRAM IN ORGANIC AGRICULTURE FOR AT-RISK HIGH SCHOOL STUDENTS	30,270
Total  3a				2,028,170


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CENTRAL COAST RESCUE MISSION 1297 N MCCLELLAND STREET SANTA MARIA,CA 93454	NONE	PC	FOR THE SANTA MARIA OUTREACH PROGRAMS FOR THE UNDERSERVED POOR AND HOMELESS	25,000
CHILDREN'S RESOURCE NETWORK OF CENTRAL COAST PO BOX 454 PISMO BEACH,CA 93448	NONE	PC	FOR THE COLLECTION AND DISTRIBUTION OF CLOTHING, BOOKS AND SCHOOL SUPPLIES TO DISADVANTAGED FAMILIES	15,000
CHINATOWN COMMUNITY DEVELOPMENT CENTER 1525 GRANT AVENUE SAN FRANCISCO,CA 94133	NONE	PC	FOR THE YOUTH SINGLE ROOM OCCUPANCY INTERGENERATIONAL PROGRAM	20,000
CLINIC BY THE BAY 4877 MISSION STREET SAN FRANCISCO,CA 94112	NONE	PC	FOR EXPANDING THE SATURDAY PRIMARY HEALTH CARE CLINIC FROM A BI-WEEKLY TO WEEKLY BASIS	25,000
COLLEGE OF THE CANYONS FOUNDATION 26455 ROCKWELL CANYON ROAD SANTA CLARITA,CA 91355	NONE	PC	FOR THE MEDICAL LABORATORY TECHNICIAN PROGRAM (MATCHING)	50,000
COMMUNITY PARTNERS IN CARING 120 E JONES STREET SANTA MARIA,CA 93454	NONE	PC	FOR VOLUNTEER TRANSPORTATION AND SUPPORT SERVICES FOR THE ELDERLY IN SANTA MARIA VALLEY	10,000
CUYAMA VALLEY FAMILY RESOURCE CENTER PO BOX 5 4689 HIWAY 166 NEWCUYAMA,CA 93254	NONE	PC	FOR THE FAMILY EMPOWERMENT PROGRAM OF SUPPORT SERVICES AND RESOURCES	20,000
DOMESTIC VIOLENCE CENTER OF SCV PO BOX 220037 NEWHALL,CA 91322	NONE	PC	FOR THE DOMESTIC VIOLENCE ADVOCATE COUNSELOR TRAINING PROGRAMS (MATCHING)	20,000
ENTERPRISE FOR HIGH SCHOOL STUDENTS 200 PINE STREET 6TH FLOOR SAN FRANCISCO,CA 94104	NONE	PC	FOR THE PATHWAYS/CAREER EXPLORATION PROGRAM	15,000
ENVIRONMENTAL TRAVELING COMPANIONS 204 BAY STREET SAN FRANCISCO,CA 94133	NONE	PC	FOR THE YOUTH LEAD AND FELLOWSHIP PROGRAM	25,000
FACES (FAMILY & CHILD EMPOWERMENT SERVICES) 1101 MASONIC AVENUE SAN FRANCISCO,CA 94117	NONE	PC	FOR THERAPEUTIC COUNSELING SERVICES FOR CHILDREN IN THE BAYVIEW AFTERSCHOOL PROGRAM	25,000
FILLMORE HIGH SCHOOL 555 CENTRAL AVENUE FILLMORE,CA 93015	NONE	PC	FOR THE 2015 SCHOLARSHIP PROGRAM FOR COLLEGE-BOUND GRADUATES	24,000
FINE ARTS MUSEUMS OF SAN FRANCISCO 50 HAGIWARA TEA GARDEN DRIVE SAN FRANCISCO,CA 94118	NONE	PC	FOR THE MUSEUM AMBASSADOR PROGRAM	20,000
FIREBAUGH HIGH SCHOOL 1976 MORRIS KYLE DRIVE FIREBAUGH,CA 93622	NONE	PC	FOR THE 2015 SCHOLARSHIP PROGRAM FOR COLLEGE-BOUND GRADUATES	24,000
FLYNN ELEMENTARY SCHOOL PTA 3125 CESAR CHAVEZ STREET SAN FRANCISCO,CA 94110	NONE	PC	FOR THE DEDICATED WATER LEARNING ZONE PROGRAM	15,000
Total  3a				2,028,170


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FOODBANK OF SANTA BARBARA COUNTY 4554 HOLLISTER AVENUE SANTA BARBARA,CA 93110	NONE	PC	FOR THE SANTA MARIA VALLEY FOODBANK DISTRIBUTION AND OUTREACH PROGRAMS	50,000
FOUNDATION CENTER 312 SUTTER STREET SUITE 606 SAN FRANCISCO,CA 94108	NONE	PC	FOR THE SAN FRANCISCO REGIONAL LIBRARY AND EDUCATIONAL RESOURCE CENTER FOR PHILANTHROPY	5,000
FRIENDS OF THE GUADALUPE PUBLIC LIBRARY PO BOX 303 GUADALUPE,CA 93434	NONE	PC	FOR THE PURCHASE OF TWO UNITS OF EARLY LEARNING AWE COMPUTERS	4,800
FRIENDS OF THE LOS ALAMOS PUBLIC LIBRARY PO BOX 493 LOS ALAMOS,CA 93440	NONE	PC	FOR UPDATING THE ORIGINAL LIBRARY BUILDING TO MEET CODE ISSUES, ADA COMPLIANCE AND WIRING FOR INTERNET ACCESS	10,000
FRIENDS OF THE OAKLAND PUBLIC SCHOOL LIBRARIES 5945 JOHNSON DRIVE OAKLAND,CA 94611	NONE	PC	FOR THE LIBRARY AND INFORMATION CENTER AT MCCLYMONDS HIGH SCHOOL	10,000
GANNA WALSKA LOTUSLAND 695 ASHLEY ROAD SANTA BARBARA,CA 93108	NONE	PC	FOR EXPANDING THE INTRODUCTORY 4TH GRADE LIFE SCIENCES AND BOTANY PROGRAM TO NORTH COUNTY SCHOOLS	10,000
GENSPAN FOUNDATION 1418 EAST MAIN STREET STE 120 SANTA MARIA,CA 93454	NONE	PC	FOR THE VOLUNTEER IN-CLASSROOM MENTORING PROGRAM IN SMV PUBLIC SCHOOLS	10,000
GIBBON CONSERVATION CENTER PO BOX 800249 SANTA CLARITA,CA 91380	NONE	PC	FOR THE EDUCATION PROGRAM TO PROMOTE THE CONSERVATION, STUDY AND CARE OF GIBBONS	20,000
GIRLS ON THE RUN 2543 18TH STREET STE 31 SAN FRANCISCO,CA 94110	NONE	PC	FOR THE CURRICULUM-BASE, INNOVATIVE RUNNING PROGRAM FOR 3RD-5TH GRADE GIRLS	15,000
GLIDE FOUNDATION 434 ELLIS STREET SAN FRANCISCO,CA 94102	NONE	PC	FOR THE DAILY FREE MEALS PROGRAM	20,000
HABITAT FOR HUMANITY SAN 21031 VENTURA BLVD STE 610 WOODLAND HILLS,CA 91364	NONE	PC	FOR THE HABITAT ENRICHED NEIGHBORHOOD FOR VETERANS PROGRAM OF SELF-SUFFICIENCY TRAINING	25,000
HART MUSEUM AND RANCH 24151 NEWHALL AVENUE NEWHALL,CA 91321	NONE	PC	FOR EDUCATIONAL AND PUBLIC PROGRAMMING FOR FAMILIES AND CHILDREN	10,000
HART UNION HIGH SCHOOL DISTRICT 21515 CENTRE POINTE PARKWAY SANTA CLARITA,CA 91350	NONE	PC	FOR THE 2015 SCHOLARSHIP PROGRAM FOR COLLEGE-BOUND GRADUATES	149,000
HEARING AND SPEECH CENTER 1234 DIVISADERO STREET SAN FRANCISCO,CA 94115	NONE	PC	FOR THE FACES PROGRAM FOR FAMILIES OF NEWLY-DIAGNOSED CHILDREN WITH A HEARING LOSS (MATCHING) AND THE HEALTH THROUGH HEARING PROGRAM FOR LOW-INCOME SENIORS	35,000
IGNITE 1624 FRANKLIN STREET STE 1001 OAKLAND,CA 94612	NONE	PC	FOR CIVIC ENGAGEMENT AND LEADERSHIP TRAINING PROGRAMS FOR HIGH SCHOOL AND COLLEGE WOMEN	20,000
Total  3a				2,028,170

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
IN-HOME SUPPORTIVE SERVICES CONSORTIUM 1390 MARKET STREET SUITE 250 SAN FRANCISCO,CA 94103	NONE	PC	FOR THE TAPCARE PROGRAM, AN ONLINE MARKETPLACE FOR CONSUMERS TO FIND TRAINED AND INDEPENDENT CAREGIVERS	20,000
LA HERMANDAD HANK LACAYO YOUTH & FAMILY CENTER 217 W MAIN STREET SANTA MARIA,CA 93458	NONE	PC	FOR THE SANTA MARIA SATELLITE SERVICES FOR AGRICULTURAL WORKERS AND THEIR FAMILIES	12,800
LIFE LEARNING ACADEMY 651 8TH STREET BLDG 229 SAN FRANCISCO,CA 94130	NONE	PC	FOR THE TRUANCY REDUCTION PROGRAM	25,000
LIFE STEPS FOUNDATION 5839 GREEN VALLEY CIRCLE 204 CULVER CITY,CA 90230	NONE	PC	FOR START UP FUNDING TO LAUNCH THE ALZHEIMER'S ADULT DAY HEALTH CARE PROGRAM AT THE SANTA MARIA WISDOM CENTER	20,000
LONGFELLOW ELEMENTARY SCHOOL PTA 755 MORSE STREET SAN FRANCISCO,CA 94121	NONE	PC	FOR THE PURCHASE OF BOOKS TO BUILD UP CLASSROOM LIBRARIES	30,000
LOVED TWICE 4123 BROADWAY STE 15 OAKLAND,CA 94611	NONE	PC	FOR THE DISTRIBUTION OF 500 BOXES OF BABY CLOTHES TO SAN FRANCISCO SOCIAL SERVICE AGENCIES	20,000
MARIAN REGIONAL MEDICAL CENTER FOUNDATION 1400 EAST CHURCH STREET SANTA MARIA,CA 93454	NONE	PC	FOR THE PROFESSIONAL EDUCATION SIMULATION LABORATORY (MATCHING GRANT) AND A CENTRAL MONITORING SYSTEM FOR THE NEW PEDIATRIC INTENSIVE CARE UNIT	100,000
MERITUS COLLEGE FUND PO BOX 29024 SAN FRANCISCO,CA 94129	NONE	PC	FOR THE CONNECTIONS PROGRAM OF INDIVIDUALIZED COACHING, MENTORING AND CAREER DEVELOPMENT	30,000
MY STUFF BAGS FOUNDATION 5347 STERLING CENTER DRIVE WESTLAKE VILLAGE,CA 91361	NONE	PC	FOR AGE AND GENDER-APPROPRIATE DUFFELS TO GIVE CHILDREN ENTERING FOSTER CARE AND CRISIS SHELTERS	15,000
NEWHALL SCHOOL DISTRICT 25375 ORCHARD VALLEY RD VALENCIA,CA 91355	NONE	PC	FOR THE DISTRICT-WIDE INSTRUMENTAL MUSIC PROGRAM (MATCHING)	10,000
ONE STEP A LA VEZ PO BOX 192 FILLMORE,CA 93016	NONE	PC	FOR THE TEEN WELLNESS DROP-IN CENTER AND AFTER SCHOOL PROGRAM (MATCHING)	25,000
OPENHOUSE 1800 MARKET STREET PMB 93 SAN FRANCISCO,CA 94102	NONE	PC	FOR THE HEALTH AND WELLNESS PROGRAM TO PROMOTE HEALTHY AGING FOR SAN FRANCISCO LGBT SENIORS	30,000
PLANTING JUSTICE 996 B 62ND STREET OAKLAND,CA 94608	NONE	PC	FOR THE SAN QUENTIN EDUCATION, IN-PRISON GARDENING AND POST-RELEASE EMPLOYMENT PROGRAM	25,000
RAPHAEL HOUSE 1065 SUTTER STREET SAN FRANCISCO,CA 94109	NONE	PC	FOR THE CAREER DEVELOPMENT PROGRAM FOR HOMELESS FAMILIES TO GAIN EMPLOYMENT AND LONGER-TERM STABILITY	25,000
SAN CAYETANO ELEMENTARY SCHOOL 514 MOUNTAIN VIEW STREET FILLMORE,CA 93015	NONE	PC	FOR THE ART ENRICHMENT PROGRAM	8,500
Total  3a				2,028,170

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SAN FRANCISCO CLASSICAL VOICE 44 GOUGH STREET STE 204 SAN FRANCISCO,CA 94103	NONE	PC	FOR THE WRITEON ¹ WORKSHOPS FOR HIGH SCHOOL STUDENTS	10,000
SAN FRANCISCO CONSERVATORY OF MUSIC 50 OAK STREET SAN FRANCISCO,CA 94102	NONE	PC	FOR THE CONSERVATORY IN THE SCHOOL PROGRAM IN UNDERSERVED SF PUBLIC SCHOOLS	20,000
SANTA BARBARA BICYCLE COALITION PO BOX 92047 SANTA BARBARA,CA 93190	NONE	PC	FOR THE SIX WEEK, AFTERSCHOOL EARN-A-BIKE PROGRAM FOR JUNIOR HIGH SCHOOL STUDENTS IN SANTA MARIA	12,000
SANTA CLARITA VALLEY EDUCATION FOUNDATION PO BOX 221295 SANTA CLARITA,CA 91322	NONE	PC	FOR THE READ WITH ME ¹ LITERACY PROGRAM (MATCHING)	10,000
SANTA CLARITA VALLEY FAMILY YMCA 26147 MCBEAN PARKWAY VALENCIA,CA 91355	NONE	PC	FOR THE BUILDING CAPITAL CAMPAIGN (MATCHING)	50,000
SANTA CLARITA VALLEY FOOD PANTRY 24133 RAILROAD AVENUE NEWHALL,CA 91321	NONE	PC	FOR THE PANTRY'S FOOD DISTRIBUTION PROGRAMS AND A REPLACEMENT VEHICLE FOR DAILY PICK-UPS OF DONATED FOOD	35,000
SANTA CLARITA VALLEY INTERNATIONAL CHARTER SCHOOL 28060 HASLEY CANYON RD CASTAIC,CA 91384	NONE	PC	FOR EQUIPMENT NEEDED FOR DRUM TRAINING, SCHOOL THEATRE AND HIGH SCHOOL ATHLETIC PROGRAMS	25,000
SANTA CLARITA VALLEY YOUTH PROJECT PO BOX 801982 SANTA CLARITA,CA 91380	NONE	PC	FOR CAMPUS-BASED PEER EDUCATION AND MENTORING SUPPORT FOR MIDDLE AND HIGH SCHOOL STUDENTS (MATCHING)	10,000
SANTA MARIA DISCOVERY MUSEUM 705 S MCCLELLAND STREET SANTA MARIA,CA 93454	NONE	PC	FOR THE MUSEUM'S WEEKLY EDUCATION PROGRAMS FOR FAMILIES AND YOUTH	20,000
SANTA MARIA FUTURE FARMERS OF AMERICA 901 SOUTH BROADWAY SANTA MARIA,CA 93454	NONE	PC	FOR THE SANTA MARIA FFA PROGRAM AND STATE LEADERSHIP DEVELOPMENT CONTINUUM	14,000
SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT 2560 SKYWAY DRIVE SANTA MARIA,CA 93455	NONE	PC	FOR THE 2015 SCHOLARSHIP PROGRAM FOR COLLEGE-BOUND GRADUATES	72,000
SANTA MARIA VALLEY HUMANE SOCIETY 1687 W STOWELL RD SANTA MARIA,CA 93458	NONE	PC	FOR THE CONSTRUCTION OF THE THIRD ANIMAL KENNEL BUILDING	36,000
SANTA MARIA VALLEY YMCA 3400 SKYWAY DRIVE SANTA MARIA,CA 93455	NONE	PC	FOR THE YOUNG CHILD'S PRESCHOOL AND SWIM PROGRAM AND REPLACEMENT OF THE ORIGINAL TILE AND LINOLEUM FLOORING IN THE Y FACILITY (MATCHING)	50,000
SAUGUS UNION SCHOOL DISTRICT 24930 AVENUE STANFORD SANTA CLARITA,CA 91355	NONE	PC	FOR THE STEAM ACTIVITIES AT 15 SCHOOL SITES	22,500
SEVEN TEEPEES YOUTH PROGRAM 3177 17TH STREET SAN FRANCISCO,CA 94110	NONE	PC	FOR THE YEAR-ROUND MENTOR PROGRAM SERVING HIGH AT-RISK 7TH GRADE STUDENTS	25,000
Total  3a				2,028,170

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SINGLE MOTHERS OUTREACH 23780 NEWHALL AVENUE STE 203 NEWHALL,CA 91321	NONE	PC	FOR CRISIS INTERVENTION SERVICES FOR SINGLE-PARENT FAMILIES TO STABILIZE THEIR LIVES (MATCHING)	10,000
SUNSET YOUTH SERVICES 3918 JUDAH STREET SAN FRANCISCO,CA 94122	NONE	PC	FOR THE DIGITAL ARTS PROGRAM OF TECHNOLOGY TRAINING AND MENTORING (MATCHING)	30,000
TENDERLOIN MUSEUM 126 HYDE STREET SAN FRANCISCO,CA 94102	NONE	PC	FOR THE MUSEUM'S OUTREACH AND EDUCATIONAL PROGRAMS	25,000
TRANSITIONS-MENTAL HEALTH ASSOCIATION PO BOX 15408 SAN LUIS OBISPO,CA 93406	NONE	PC	FOR THE GROWING GROUNDS VOCATIONAL ADVANCEMENT PROGRAM	40,000
WOMEN'S COMMUNITY CLINIC 1833 FILLMORE STREET SAN FRANCISCO,CA 94115	NONE	PC	FOR THE OUTREACH PROGRAM FOR HOMELESS AND marginally-housed WOMEN ACCESS TO FOOD, SUPPORT SERVICES AND HEALTH CARE	25,000
WOMEN'S ECONOMIC VENTURES 333 S SALINAS STREET SANTA BARBARA,CA 93103	NONE	PC	FOR THE EN ESPAÑOL PROGRAM OF SELF-EMPLOYMENT TRAINING AND MICRO-LOANS FOR LOW-INCOME LATINA WOMEN ENTREPRENEURS (MATCHING)	10,000
FOUNDATION FOR CHILDREN'S DENTAL HEALTH 27943 SECO CANYON RD 527 SANTA CLARITA,CA 91350	NONE	PC	REFUND FROM 2013 GRANT	-5,000
Total				2,028,170

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.</div>	<div>OMB No 1545-0047</div> <div>2014</div>
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<div>Name of the organization</div> <div>THE HENRY MAYO NEWHALL FOUNDATION C/O KRAMER BLUM AND ASSOCIATES INC</div>	<div>Employer identification number</div> <div>94-6073084</div>
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<div><input type="checkbox"/> 501(c)() (enter number) organization</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div> <div><input type="checkbox"/> 527 political organization</div>
Form 990-PF	<div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div> <div><input type="checkbox"/> 501(c)(3) taxable private foundation</div>

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Employer identification number
94-6073084

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	LEILA NEWHALL CHARITABLE REMAINDER C/O WELLS FARGO BANK NA PO BOX 6395 SAN FRANCISCO, CA 94163	\$ 2,193	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization THE HENRY MAYO NEWHALL FOUNDATION C/O KRAMER BLUM AND ASSOCIATES INC	Employer identification number 94-6073084
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Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<div>_____</div>	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>	<div>_____ \$</div>	<div>_____</div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<div>_____</div>	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>	<div>_____ \$</div>	<div>_____</div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<div>_____</div>	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>	<div>_____ \$</div>	<div>_____</div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<div>_____</div>	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>	<div>_____ \$</div>	<div>_____</div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<div>_____</div>	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>	<div>_____ \$</div>	<div>_____</div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<div>_____</div>	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>	<div>_____ \$</div>	<div>_____</div>

Name of organization THE HENRY MAYO NEWHALL FOUNDATION C/O KRAMER BLUM AND ASSOCIATES INC	Employer identification number 94-6073084
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Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	

TY 2014 Accounting Fees Schedule**Name:** THE HENRY MAYO NEWHALL FOUNDATION

C/O KRAMER BLUM AND ASSOCIATES INC

EIN: 94-6073084

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	17,917	13,438		4,479
AUDIT FEES	14,000	0		14,000

TY 2014 Distribution from Corpus Election

Name: THE HENRY MAYO NEWHALL FOUNDATION
C/O KRAMER BLUM AND ASSOCIATES INC

EIN: 94-6073084

Election: SEC. 53.4942(A)-3(D)(2) ELECTIONORGANIZATION HEREBY
ELECTS UNDER IRC REG. SECTION 53-4942(A)-3(D)(2)TO TREAT
\$190,386 OF THE QUALIFYING DISTRIBUTIONS FOR 2007 AS
HAVINGBEEN DISTRIBUTED OUT OF CORPUS.

TY 2014 Investments Corporate Bonds Schedule

Name: THE HENRY MAYO NEWHALL FOUNDATION

C/O KRAMER BLUM AND ASSOCIATES INC

EIN: 94-6073084

Name of Bond	End of Year Book Value	End of Year Fair Market Value
400,000 BERKSHIRE HEALTH FIN 5.4% 5/15/18	423,575	447,924
400,000 CATERPILLAR INC 5.7% 8/15/16	417,423	431,105
400,000 JP MORGAN CHASE 4.65% 6/1/14	0	0
125,000 ORACLE 5.25% 1/15/16	122,888	130,967
400,000 UNITED TECH CORP 5.375% 12/15/17	416,526	444,982
150,000 EI DU PONT DE NEMOURS 6% 7/15/18	163,664	170,702
150,000 HEWLETT PACKARD 4.75%	0	0
400,000 CISCO SYSTEMS INC 4.95%	442,366	447,132
400,000 GEN ELEC CAP 5.625%	417,700	449,861
400,000 PEPSICO INC 4.5% 1/15/20	440,307	440,714
250,000 SOUTHWESTERN BELL TEL 7% 7/1/15	258,695	256,638
400,000 DISNEY WALT CO 5.625% 9/15/16	433,210	432,767
400,000 BLACKROCK INC 5% 12/10/19	456,673	451,770
300,000 GOLDMAN SACHS 5.125% 1/15/15	300,468	300,326
400,000 WELLS FARGO 5.625% 12/11/17	443,690	445,270
400,000 COSTCO WHOLESALE 1.125% 12/15/17	398,195	397,578
250,000 EL DU PONT DE NEMOURS 5.25% 12/15/16	271,342	270,216
250,000 INTEL CORPORATION 3.3% 10/1/21	260,441	262,000
375,000 JP MORGAN CHASE 3.45% 3/1/16	386,472	384,662
250,000 MORGAN STANLEY 4.75% 3/22/17	267,660	266,290

Name of Bond	End of Year Book Value	End of Year Fair Market Value
250,000 ORACLE 2.25% 10/8/19	251,038	251,335
400,000 SHELL INTL FIN B 4.3% 9/22/19	440,936	438,536
400,000 WAL-MART STORES 3.25% 10/25/20	419,640	420,279

**TY 2014 Investments Corporate
Stock Schedule**

Name: THE HENRY MAYO NEWHALL FOUNDATION
C/O KRAMER BLUM AND ASSOCIATES INC
EIN: 94-6073084

Name of Stock	End of Year Book Value	End of Year Fair Market Value
4,430 AETNA INC	136,390	393,517
4,320 ANADARKO PETROLEUM CORP	274,517	356,400
14,890 APPLE COMPUTER INC	188,890	1,643,558
4,350 CVS CAREMARK INC	147,218	418,949
14,575 CISCO SYSTEMS INC	272,350	405,403
10,210 COMCAST CORP	301,582	592,282
4,885 DANAHER CORP	176,963	418,693
1,985 EQT CORP	74,884	150,265
7,893 EXPRESS SCRIPTS INC	384,143	668,300
3,886 FIDELITY NATL INFO SVCS	77,237	241,709
4,770 FISERV INC.	115,137	338,527
16,945 GENERAL ELECTRIC CO	255,750	428,200
7,475 JP MORGAN	259,000	467,786
5,749 MERCK & CO INC.	172,721	326,486
12,320 ORACLE CORP	275,642	554,030
2,945 PEPSICO INCORPATED	187,650	278,479
2,940 PRAXAIR INC	252,424	380,906
3,905 TARGET CORPORATION	0	0
3,040 UNITED TECHNOLOGIES	161,074	349,600
4,550 UNITED HEALTH GROUP INC	108,070	459,960
3,840 VF CORP	76,903	287,616
3,690 WALGREEN COMPANY	0	0
7,890 WELLS FARGO & CO	237,837	432,530
10,150 WILLIAMS COMPANIES	267,888	456,141
897 ALLIANCE DATA SYSTEMS	50,030	256,587
2,865 APACHE CORP	235,773	179,550
6,601 REPUBLIC SERVICES INC.	0	0
6,355 TJX COS INC.	235,718	435,826
1,596 VISA INC	188,544	418,471
5,285 AUTO DATA PROCESSING	195,161	440,610

Name of Stock	End of Year Book Value	End of Year Fair Market Value
6,075 COVIDIEN PLC NEW	336,903	621,351
7,290 FREEPORT MCMORAN COPPER	0	0
680 GOOGLE INC CLASS C	278,845	357,952
2,535 MCDONALDS CORP	0	0
9,825 MICROSOFT CORP	245,557	456,371
3,410 NETAPP INC	0	0
21,640 BANK OF AMERICA CORP	211,459	387,140
741 BLACKROCK	130,948	264,952
5,690 CITIGROUP INC	210,105	307,886
2,745 CHECK PT SOFTWARE TECH	129,979	215,675
6,110 CROWN HOLDINGS INC	0	0
11,350 E M C CORP MASS	273,186	337,549
2,970 JOHNSON & JOHNSON	202,116	310,573
6,910 KINDER MORGAN INC	0	0
4,015 PG&E CORP	0	0
3,785 STRYKER CORP	200,641	357,039
9,255 U S BANCORP	332,181	416,012
1,940 UNION PACIFIC CORP	110,917	231,112
2,450 BOEING CO	183,889	318,451
4,120 CAPITAL ONE FINANCIAL	215,696	340,106
3,520 CITRIX SYSTEMS INC	214,098	224,576
1,840 DIRECTV	90,710	159,528
2,150 DISNEY WALT CO	135,065	202,509
4,820 DOLLAR GENERAL CORP	217,197	340,774
5,120 HOME DEPOT INC	396,511	537,446
2,795 KELLOGG COMPANY	0	0
7,375 MARATHON OIL CORP	266,581	208,639
3,020 TERADATA CORP	158,243	131,914
1,197 AMAZON.COM INC	372,337	371,489
3,520 COLGATE-PALMOLIVE CO	226,681	243,549

Name of Stock	End of Year Book Value	End of Year Fair Market Value
326 GOOGLE INC CLASS A	88,779	172,995
4,140 MACYS INC	241,564	272,205
1,485 MEDTRONIC INC	92,063	107,217
3,655 OMNICOM GROUP INC	258,691	283,153
4,260 PRUDENTIAL FINANCIAL INC	368,414	385,360
7,870 VERIZON COMMUNICATIONS	381,410	368,159

TY 2014 Investments Government Obligations Schedule

Name: THE HENRY MAYO NEWHALL FOUNDATION
C/O KRAMER BLUM AND ASSOCIATES INC

EIN: 94-6073084

US Government Securities - End of Year Book Value:	1,067,267
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US Government Securities - End of Year Fair Market Value:	1,080,775
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State & Local Government Securities - End of Year Book Value:	0
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State & Local Government Securities - End of Year Fair Market Value:	0
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TY 2014 Investments - Other Schedule

Name:
THE HENRY MAYO NEWHALL FOUNDATION
C/O KRAMER BLUM AND ASSOCIATES INC
EIN: 94-6073084

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
76,510.979 BOSTON TRUST SMALL CAP	AT COST	0	0
19,498.062 MANAGERS AMG TIMES SQUARE MID CAP	AT COST	239,977	361,494
11,385.683 MATTHEWS PACIFIC TIGER	AT COST	217,368	302,404
12,650 JP MORGAN EXCH TRADED NT	AT COST	412,839	581,268
6,180 SPDR S&P 400 ETF	AT COST	585,926	1,631,335
288,556.272 RIDGEWORTH SEIX FLOAT	AT COST	2,576,515	2,524,867
363,991.735 FRANKLIN HIGH INCOME	AT COST	0	0
26,415.972 LAZARD EMERG MKTS INST	AT COST	0	0
9,158.347 YACKTMAN FOCUSED FUND	AT COST	0	0
136,375.754 ANGEL OAK MULTI STRATEGY INC	AT COST	1,662,054	1,644,692
12,596.161 HARBOR INTERNATIONAL FUND	AT COST	850,100	815,979
45,699.273 JHANCOCK2 GLBL ABSOLUTE RETURN STRAT I	AT COST	0	0
15,133.092 MAINSTAY EPOCH GLOBAL	AT COST	290,000	294,944
29,256.875 MAINSTAY MARKETFIELD FD CL	AT COST	0	0
1,029 AVALONBAY CMNTYS INC REIT	AT COST	128,286	168,128
65,500 BARCLAYS BANK ETN	AT COST	1,644,441	2,003,645
8,030 ISHARES RUSSELL GROWTH MIDCAP GROWTH	AT COST	0	0
8,000 ISHARES TR RUSSELL 1000 GROWTH	AT COST	600,827	764,880
1,550 SIMON PPTY GROUP NEW REIT	AT COST	231,355	282,271
6,960 VANGUARD TOTAL STOCK MKT	AT COST	0	0
7,767.377 HARDING LOEVNER EMERGING MARKETS	AT COST	390,000	354,348
22,333.189 TWEEDY BROWNE GLOBAL	AT COST	604,050	581,556
100,000 LEHMAN BROS HLDG	AT COST	0	13,500

TY 2014 Other Expenses Schedule

Name: THE HENRY MAYO NEWHALL FOUNDATION

C/O KRAMER BLUM AND ASSOCIATES INC

EIN: 94-6073084

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK CHARGES	139	139		0
FILING FEES	160	0		160
OFFICE EXPENSES	4,307	0		4,307
INSURANCE	2,680	0		2,680

TY 2014 Other Professional Fees Schedule**Name:** THE HENRY MAYO NEWHALL FOUNDATION

C/O KRAMER BLUM AND ASSOCIATES INC

EIN: 94-6073084

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	199,501	199,501		0
MANAGEMENT FEES	148,574	0		148,574
OUTSIDE SERVICES	690	0		690

TY 2014 Taxes Schedule**Name:** THE HENRY MAYO NEWHALL FOUNDATION

C/O KRAMER BLUM AND ASSOCIATES INC

EIN: 94-6073084

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL INCOME TAXES	5,000	0		0
FOREIGN TAXES WITHHELD	285	285		0