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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 LOWELL BERRY FOUNDATION		A Employer identification number 94-6108391	
Number and street (or P O box number if mail is not delivered to street address) 3685 Mt Diablo Blvd 351		B Telephone number (see instructions) (925) 284-4427	
City or town, state or province, country, and ZIP or foreign postal code Lafayette, CA 94549		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		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 ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 28,173,758		J Accounting method ☒ Cash ☐ Accrual ☐ 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 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	154	154	154	
	4 Dividends and interest from securities.	574,984	574,984	574,984	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	621,857			
	b Gross sales price for all assets on line 6a 6,924,289				
	7 Capital gain net income (from Part IV, line 2) . . .		621,857		
	8 Net short-term capital gain			26,724	
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	1,196,995	1,196,995	601,862	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages	38,473	1,924		36,549
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	11,211	561		10,650
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	29,328	2,307		27,021
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy	31,050	1,553		29,497
	21 Travel, conferences, and meetings	145	7		138
	22 Printing and publications				
	23 Other expenses (attach schedule)	23,257	1,163		22,094
	24 Total operating and administrative expenses. Add lines 13 through 23	133,464	7,515		125,949
	25 Contributions, gifts, grants paid	1,400,000			1,400,000
	26 Total expenses and disbursements. Add lines 24 and 25	1,533,464	7,515		1,525,949
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-336,469			
	b Net investment income (if negative, enter -0-)		1,189,480		
	c Adjusted net income (if negative, enter -0-)			601,862	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	50	50	50
	2	Savings and temporary cash investments	318,085	241,180	241,180
	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	6,463	4,210	4,210
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	27,178,886	27,928,318	27,928,318
	14	Land, buildings, and equipment basis ▶ _____ 64,316 Less accumulated depreciation (attach schedule) ▶ _____ 64,316			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	27,503,484	28,173,758	28,173,758	
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 ▶ _____)	2,690	2,711	
	23	Total liabilities (add lines 17 through 22)	2,690	2,711	
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	27,500,794	28,171,047	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	27,500,794	28,171,047	
	31	Total liabilities and net assets/fund balances (see instructions) . . .	27,503,484	28,173,758	

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 27,500,794
2	Enter amount from Part I, line 27a	2 -336,469
3	Other increases not included in line 2 (itemize) ▶ _____	3 1,006,722
4	Add lines 1, 2, and 3	4 28,171,047
5	Decreases not included in line 2 (itemize) ▶ _____	5
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 28,171,047

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	621,857
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	26,724

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	1,416,066	25,505,481	0 05552
2012	1,366,830	23,447,032	0 05829
2011	1,388,635	23,641,609	0 05874
2010	1,393,589	22,669,291	0 06148
2009	1,198,055	20,099,380	0 05961

2	Total of line 1, column (d).	2	0 29363
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 05873
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	27,634,987
5	Multiply line 4 by line 3.	5	1,622,920
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	11,895
7	Add lines 5 and 6.	7	1,634,815
8	Enter qualifying distributions from Part XII, line 4.	8	1,525,949

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

Part VI

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

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		123,790	
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.		323,790	
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-		523,790	
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014		6a	28,000
b		Exempt foreign organizations—tax withheld at source		6b	
c		Tax paid with application for extension of time to file (Form 8868)		6c	
d		Backup withholding erroneously withheld		6d	
7		Total credits and payments. Add lines 6a through 6d.		728,000	
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.		104,210	
11		Enter the amount of line 10 to be Credited to 2015 estimated tax 4,210 Refunded		11	

Part VII-A

Statements Regarding Activities

1a		During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		1a	Yes	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 \$ (2) On foundation managers \$				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		No
		If "Yes," attach a detailed description of the activities.				
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year?		4b		No
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 N/A				
14	The books are in care of Gary Depolo Telephone no (925) 284-4427 Located at 3685 Mt Diablo Blvd 351 Lafayette CA ZIP+4 94549			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 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? 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)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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? 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		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes 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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.).	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 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))?

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 4945(d)(4)(A)? (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

No

Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes

No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

No

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.

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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 THE FOUNDATION HAS ONE CHARITABLE ACTIVITY (SEE EXPLANATION IN PART XVI-B)	0
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see 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	27,644,260
b	Average of monthly cash balances.	1b	411,564
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	28,055,824
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	28,055,824
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	420,837
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	27,634,987
6	Minimum investment return. Enter 5% of line 5.	6	1,381,749

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	1,381,749
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	23,790
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	23,790
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,357,959
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,357,959
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	1,357,959

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	1,525,949
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	1,525,949
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	1,525,949

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				1,357,959
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014				
a From 2009.	206,903			
b From 2010.	281,132			
c From 2011.	216,546			
d From 2012.	223,857			
e From 2013.	166,329			
f Total of lines 3a through e.	1,094,767			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 1,525,949				
a Applied to 2013, 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).	0			
d Applied to 2014 distributable amount.				1,357,959
e Remaining amount distributed out of corpus	167,990			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:	1,262,757			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions				
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)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . .	206,903			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	1,055,854			
10 Analysis of line 9				
a Excess from 2010. . . .	281,132			
b Excess from 2011. . . .	216,546			
c Excess from 2012. . . .	223,857			
d Excess from 2013. . . .	166,329			
e Excess from 2014. . . .	167,990			

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)

☐ 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 Lowell Berry Foundation
3685 Mt Diablo Blvd Ste 351
Lafayette, CA 94549

b

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

There is no standard request form required by the foundation All applications for grant requests are submitted on applicant's form or letterhead

c

Any submission deadlines

No deadline date required

d

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

Only restriction is that the applicant must be located in the State of California counties of Alameda or Contra Costa

Form 990-PF (2014)

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,400,000
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

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)
----------	--

Form **990-PF** (2014)

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?

Yes	No
-----	----

No

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

(1) Cash.

1a(1)

No

(2) Other assets.

1a(2)

No

b Other transactions

(1) Sales of assets to a noncharitable exempt organization.

1b(1)

No

(2) Purchases of assets from a noncharitable exempt organization.

1b(2)

No

(3) Rental of facilities, equipment, or other assets. . . .

1b(3)

No

(4) Reimbursement arrangements.

1b(4)

No

(5) Loans or loan guarantees. . . .

1b(5)

No

(6) Performance of services or membership or fundraising solicitations.

1b(6)

No

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

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

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

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.		
		2015-03-06 Date	 Title

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

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.

2015-03-06

Signature of officer or trustee

Date

Title

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

☒ Yes ☐ No

**Paid
Preparer
Use
Only**

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)
Vanguard Group 2014 transfers	P	2013-06-30	2014-12-31
Vanguard Group 2014 transfers (S/T)	P	2014-06-30	2014-12-31
Vanguard Group 2014 LTCG dividends	P	2013-06-30	2014-12-31
Vanguard Group 2014 STCG dividends	P	2014-06-30	2014-12-31
American Fund 2014 transfers	P	2013-06-30	2014-12-31
American fund 2014 LTCG dividends	P	2013-06-30	2014-12-31

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)
5,310,760		4,962,999	347,761
1,203,336		1,200,000	3,336
177,705			177,705
23,388			23,388
200,000		139,433	60,567
9,100			9,100

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	
			347,761
			3,336
			177,705
			23,388
			60,567
			9,100

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
LARRY R LANGDON	PRESIDENT 1 00	0		
137 ASH LANE PORTOLA VALLEY, CA 94028				
BARBARA B CORNEILLE	Secretary 3 00	0		
112 LARK COURT ALAMO, CA 94507				
PATRICIA B CONKLIN	Vice President 4 00	0		
2361 BAY VIEW AVENUE CARMEL, CA 93921				
GARY L DEPOLO	Treasurer 3 00	0		
37 CHARLES HILL CIRCLE ORINDA, CA 94563				
JAMI S KANE	Director 2 00	0		
314 Las Quebradas Lane Alamo, CA 94507				
JOHN D ASHER	DIRECTOR 3 00	0		
3175 Walnut Blvd Walnut Creek, CA 94596				
JAYNE S MORDELL	Director 1 00	0		
40 Palmer Lane Portola Valley, CA 94028				
ANNETTE S ROBISON	Director 2 00	0		
3154 Lucas Drive Lafayette, CA 94549				

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>				
Bay Area Rescue Mission 2114 Macdonald Ave Richmond, CA 94802	Charitable	501(c)3	General Support	20,000
The Bay Area Urban Network 745 - 105th Ave Oakland, CA 94603	Charitable	501(c)3	Various programs	147,500
Campus Crusade for Christ 1922 Grant St Apt 5 Berkeley, CA 94703	Charitable	501(c)3	General support	15,000
City Team Ministries PO Box 23833 Oakland, CA 94623	Charitable	501(c)3	General Support	45,000
Faith Network of the East Bay Inc 2633 Telegraph Ave 409 Oakland, CA 94612	Charitable	501(c)3	General support	35,000
Fuller Theological Seminary 135 North Oakland Ave Pasadena, CA 91182	Charitable	501(c)3	Various Programs	164,000
Harbor House Ministries Inc 1811 - 11th Ave Oakland, CA 94606	Charitable	501(c)3	General Support	30,000
Hawaiian Islands Ministries PO Box 777 Honolulu, HI 96808	Charitable	501(c)3	General support	35,000
InterVarsity Christian Fellowship 32802 Matthew Dr Dana Point, CA 92629	Charitable	501(c)3	Multiple Ministries	40,000
Joni & Friends - SF Bay Area 3553 Castro Valley Blvd Castro Valley, CA 94546	Charitable	501(c)3	Various programs	40,000
The Leadership Connection 1717 N California Blvd Ste 3D Walnut Creek, CA 94596	Charitable	501(c)3	General Support	50,000
New College Adv Christian Studies 2029 Durant Ave Berkeley, CA 94704	Charitable	501(c)3	General support	7,500
Prison Fellowship Ministries 44180 Riverside Pkwy Lansdowne, VA 20176	Charitable	501(c)3	Angel Tree program	25,000
School of Urban Missions PO Box 14145 Oakland, CA 94614	Charitable	501(c)3	Various programs	153,000
Young Life of Berkeley 2407 Dana Street Berkeley, CA 94704	Charitable	501(c)3	General support	20,000
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Young Life - Diablo Valley 2363 Boulevard Circle Ste 102 Walnut Creek, CA 94595	Charitable	501(c)3	General Support	42,000
Ariel Outreach Mission PO Box 5035 Oakland, CA 94605	Charitable	501(c)3	General support	5,500
Boy Scouts of America 800 Ellinwood Way Pleasant Hill, CA 94523	Charitable	501(c)3	Camperships	4,000
Camps in Common PO Box 11061 Oakland, CA 94611	Charitable	501(c)3	Camperships	4,000
The Foundation Center 312 Sutter St Ste 606 San Francisco, CA 94108	Charitable	501(c)3	General Support	1,000
Girl Scouts of No California 7700 Edgewater Dr Ste 340 Oakland, CA 94621	Charitable	501(c)3	Camperships	2,000
Interfaith Council of CC County 1543 Sunnyvale Ave Walnut Creek, CA 94597	Charitable	501(c)3	Winter Nights Program	6,000
Junior Center of Art and Science 558 Bellevue Ave Oakland, CA 94610	Charitable	501(c)3	Camperships	2,500
Kidpower Teenpower Fullpower PO Box 2163 Castro Valley, CA 94546	Charitable	501(c)3	Victimization Risk	1,500
Loaves & Fishes of Contra Costa 510 Garcia Ave Pittsburg, CA 94565	Charitable	501(c)3	General Support	5,000
Monument Crisis Center 2350 Monument Blvd Ste B Concord, CA 94520	Charitable	501(c)3	General support	4,000
O kizu Foundation 16 Digital Dr Novato, CA 94949	Charitable	501(c)3	General support	6,500
Prescott-Joseph Center 920 Peralta St Oakland, CA 94607	Charitable	501(c)3	General support	3,000
Regional Parks Foundation PO Box 21074 Oakland, CA 94620	Charitable	501(c)3	Camperships	5,000
St Marys College PO Box 4300 Moraga, CA 94575	Charitable	501(c)3	Vern Oswald Scholarship	2,500
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
The Salvation Army PO Box 1884 Monterey, CA 93942	Charitable	501(c)3	General support	1,500
Samaritan Neighborhood Center 534 - 22nd St Oakland, CA 94612	Charitable	501(c)3	General support	5,000
Todays Youth Matter 461 Valley Way Milpitas, CA 95035	Charitable	501(c)3	Various programs	15,000
Trips for Kids Marin 138 Sunnyside Mill Valley, CA 94941	Charitable	501(c)3	Mt Bike Outings	4,000
All Saints Episcopal Church PO Box 1296 Carmel, CA 93921	Charitable	501(c)3	General Support	5,000
Bayshore Christian Ministries 1001 Beech St East Palo Alto, CA 94303	Charitable	501(c)3	General Support	2,000
Character Choice Inc 1545 Tanaka Dr Erie, CO 80516	Charitable	501(c)3	General Support	2,000
Community Hospital Foundation 1000 Munras Ave Ste 200 Monterey, CA 94940	Charitable	501(c)3	General Support	1,000
The Hoover Institution 326 Galvez St Stanford, CA 94305	Charitable	501(c)3	General Support	3,000
Junior League of Monterey County 391 Decatur St Monterey, CA 93940	Charitable	501(c)3	General Support	500
Monterey County Symphony Assoc PO Box 3965 Carmel, CA 93921	Charitable	501(c)3	General Support	2,500
Punahou School 1601 Puahou St Honolulu, HI 96822	Charitable	501(c)3	General Support	250
San Francisco Symphony Davies Symphony Hall San Francisco, CA 94102	Charitable	501(c)3	General support	1,000
St Stephens Episcopal Church 66 St Stephens Dr Orinda, CA 94563	Charitable	501(c)3	General Support	6,000
Stanford University Medical Ctr 326 Galvez St Stanford, CA 94305	Charitable	501(c)3	Depression research	1,650
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Stanford School of Medicine 2700 San Hill Rd Stanford, CA 94025	Charitable	501(c)3	Women's Cancer	5,000
Walnut Creek Presbyterian Church 1801 Lacassie Ave Walnut Creek, CA 94596	Charitable	501(c)3	General support	13,800
WellSpring PO Box 7384 Menlo Park, CA 94026	Charitable	501(c)3	General support	2,000
Wounded Warrior Project WWP 7020 ACSkinner Pkwy Ste 100 Jacksonville, FL 32256	Charitable	501(c)3	General support	500
Carmel-by-the-Sea Public Library Found PO Box 2042 Carmel, CA 93921	Charitable	501(c)3	General Support	500
Carmel Foundation PO Box 1050 Carmel, CA 93921	Charitable	501(c)3	General Support	1,000
Contra Costa Kops for Kids 1430 Willow Pass Rd 130 Concord, CA 94520	Charitable	501(c)3	General support	2,500
Court Appointed Spec Repres Program 2020 North Broadway Ste 204 Walnut Creek, CA 94596	Charitable	501(c)3	General Support	5,000
Hispanic Ministry Center Inc 2321 East 4th St Ste C607 Santa Ana, CA 92705	Charitable	501(c)3	UYWI - RELOAD	5,000
Oakland Youth Chorus 2501 Harrison St Oakland, CA 94612	Charitable	501(c)3	General support	1,500
PTA CA Congress 561 Merriewood Dr Lafayette, CA 94549	Charitable	501(c)3	General Support	1,000
San Francisco Ballet Assoc 455 Franklin St San Francisco, CA 94102	Charitable	501(c)3	General Support	750
Stanford Univ - Dept of Athletics 326 Galvez Street Stanford, CA 94305	Charitable	501(c)3	Various programs	19,000
Walnut Creek Education Foundation 960 Ygnacio Valley Rd Walnut Creek, CA 94596	Charitable	501(c)3	General Support	1,200
Wardrobe for Opportunity 570 14th St Ste 5 Oakland, CA 94512	Charitable	501(c)3	General Support	2,500
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Boy Scouts of America Council 1001 Davis St San Leandro, CA 94577	Charitable	501(c)3	Camperships	4,000
Child Abuse Prevention Council 1410 Danzig Plaza Ste 110 Concord, CA 94520	Charitable	501(c)3	Nurturing parent	4,000
Grace Lutheran Church 2369 Barrett Ave Richmond, CA 94804	Charitable	501(c)3	Youth Music Program	3,000
John Ernest Foundation PO Box 60225 Palo Alto, CA 94306	Charitable	501(c)3	General Support	500
League of Volunteers of Newark 36120 Ruschin Drive Newark, CA 94560	Charitable	501(c)3	Summer Park Program	3,000
Loved Twice 4245 College Ave Ste 803 Oakland, CA 94618	Charitable	501(c)3	General Support	6,000
SOAR for Youth PO Box 1291 Berkeley, CA 94701	Charitable	501(c)3	Camperships	5,000
Down Syndrome Connection 101-J Town Country Dr Danville, CA 94526	Charitable	501(c)3	General support	2,000
Family Support Services of the Bay Area 401 Grand Ave Oakland, CA 94610	Charitable	501(c)3	Kinship Youth Prog	5,000
Game Theory Academy 337 - 17th St 101 Oakland, CA 94612	Charitable	501(c)3	General support	3,000
Living Dream Arts 4198 - 2nd Ave 303 San Francisco, CA 94118	Charitable	501(c)3	General support	2,500
Monterey Bay Aquarium 886 Cannery Row Monterey, CA 93940	Charitable	501(c)3	General support	500
Mt Hermon Association Inc PO Box 413 Mt Hermon, CA 95041	Charitable	501(c)3	Camperships	1,190
Navy Seals Warrior Fund Inc 1619 D Street Virginia Beach, VA 23459	Charitable	501(c)3	General support	500
Project Avary 384 Bel Marin Keys Blvd Ste G Novato, CA 94949	Charitable	501(c)3	Various programs	3,500
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Q Place PO Box 1581 Wheaton,IL 60187	Charitable	501(c)3	Various programs	10,000
Royal Family Kids Camp 4725 Evora Road Concord,CA 94520	Charitable	501(c)3	Camperships	5,000
All Saints Episcopal Day School 8060 Carmel Valley Road Carmel,CA 93923	Charitable	501(c)3	General support	500
Alliance Defending Freedom 15100 North 90th St Scottsdale,AZ 85260	Charitable	501(c)3	General support	2,000
Chabot Space & Science Center 10000 Skyline Blvd Oakland,CA 94619	Charitable	501(c)3	Teacher Training	8,000
The Childrens Foundation PO Box 1433 Loveland,CO 80539	Charitable	501(c)3	General support	1,000
East Bay Zoological Society 9777 Golf Links Rd Oakland,CA 94605	Charitable	501(c)3	Camperships	3,000
Fellowship of Christian Athletes 8701 Leeds Road Kansas City,MO 64129	Charitable	501(c)3	Various programs	13,000
Lafayette Partners in Education PO Box 923 Lafayette,CA 94549	Charitable	501(c)3	General support	5,000
No California Urban Development Corp 1836 Bay Road East Palo Alto,CA 94303	Charitable	501(c)3	General support	7,000
Oakland Elizabeth House 6423 Colby St Oakland,CA 94618	Charitable	501(c)3	General support	4,000
Oakland Soc for Prevention 8323 Baldwin St Oakland,CA 94621	Charitable	501(c)3	General support	300
Stand For Families Free of Violence 1410 Danzig Plaza Ste 200 Concord,CA 94520	Charitable	501(c)3	General support	7,000
Tony LaRussas Animal Rescue Foundation PO Box 30215 Walnut Creek,CA 94598	Charitable	501(c)3	General support	500
United Service Organization Inc 211 Wilson Blvd Ste 1200 Arlington,VA 22201	Charitable	501(c)3	General support	250
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
University of the Pacific 3601 Pacific Ave Stockton, CA 95211	Charitable	501(c)3	Various soccer programs	12,000
Variety Club Blind Babies Found 1814 Franklin Ave 11th Floor Oakland, CA 94612	Charitable	501(c)3	General support	1,500
Acalanes Booster Club 1200 Pleasant Hill Road Lafayette, CA 94549	Charitable	501(c)3	General support	500
Acalanes Parents Club 1200 Pleasant Hill Road Lafayette, CA 94549	Charitable	501(c)3	General support	500
Alameda Boys & Girls Club Inc PO Box 1069 Alameda, CA 94501	Charitable	501(c)3	General support	3,000
Arm of Care Inc 1862 Shuey Avenue Walnut Creek, CA 94596	Charitable	501(c)3	General support	7,000
Assoc Students of Univ of Calif 112 Hearst Gym 4520 Berkeley, CA 94720	Charitable	501(c)3	Eggster	1,000
Bay Area Outreach & Recreation 3075 Adeline Street Ste 155 Berkeley, CA 94703	Charitable	501(c)3	General support	3,000
Blue Mountain Coalition for Youth and PO Box 41 West Point, CA 95255	Charitable	501(c)3	General support	1,000
Bread Project 1555 Park Avenue Unit B Emeryville, CA 94608	Charitable	501(c)3	General support	6,000
California State Parks Foundation 800 College Avenue Kentfield, CA 94914	Charitable	501(c)3	General support	500
Canine Companions for Independent Living PO Box 446 Santa Rosa, CA 95402	Charitable	501(c)3	General support	1,000
Childrens Vision First 1007 General Kennedy Ave Ste 210 San Francisco, CA 94129	Charitable	501(c)3	General support	3,000
City Team Ministries San Jose 2304 Zanker Road San Jose, CA 95131	Charitable	501(c)3	General support	2,000
Concord Comm Econ Dev Org 2699 Monument Blvd Ste G Concord, CA 94520	Charitable	501(c)3	General support	3,500
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Diocese of Oakland 2121 Harrison Street Suite 100 Oakland, CA 94612	Charitable	501(c)3	FACE	8,000
Ripe for Harvest World Outreach 2824 N Power Road 113282 Mesa, AZ 85215	Charitable	501(c)3	General support	5,000
Family Emergency Shelter Coalition 21455 Birch Street 5 Hayward, CA 94541	Charitable	501(c)3	General support	5,000
John F Kennedy University 100 Ellinwood Way Pleasant Hill, CA 94523	Charitable	501(c)3	Camperships	3,000
My New Red Shoes 330 Twin Dolphin Drive Suite 135 Redwood City, CA 94065	Charitable	501(c)3	General support	4,000
Oakland Leaf Foundation 7700 Edgewater Drive Suite 818 Oakland, CA 94621	Charitable	501(c)3	General support	4,000
Opportunity Camp 2845 Verne Roberts Circle Antioch, CA 94509	Charitable	501(c)3	Camperships	4,500
Resource Exchange Intl 5446 N Academy Blvd Ste 202 Colorado Springs, CO 80918	Charitable	501(c)3	REI-Vietnam/DC	1,000
The Rock Church 4950 Vista Blvd Sparks, NV 89436	Charitable	501(c)3	General support	1,000
The Salvation Army - Alameda County 130 Doolittle Drive Suite12 San Leandro, CA 94577	Charitable	501(c)3	Christmas food	6,000
The Salvation Army - San Francisco 832 Folsom Street 600 San Francisco, CA 94107	Charitable	501(c)3	General support	2,000
San Francisco Opera Assoc 301 Van Ness Avenue San Francisco, CA 94102	Charitable	501(c)3	General support	1,000
Stagebridge 2501 Harrison Street Oakland, CA 94612	Charitable	501(c)3	General support	2,000
Super Stars Literacy Inc 675 Hegenberger Rd Suite 250 Oakland, CA 94621	Charitable	501(c)3	General support	4,000
Taylor Family Foundation Inc 5555 Arroyo Road Livermore, CA 94550	Charitable	501(c)3	Pre-fund 2015 grant	1,000
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Treasure Island Sailing Ctr Fund 698 California Avenue Bldg 112 San Francisco, CA 94130	Charitable	501(c)3	Camperships	2,500
Trinity Center Walnut Creek 1924 Trinity Avenue Walnut Creek, CA 94596	Charitable	501(c)3	General support	4,000
Veterans of Foreign Wars Dept 7215 Lindale Drive Sacramento, CA 95828	Charitable	501(c)3	General support	250
Wuqu Kawoq SA PO 91 Bethel, VT 05032	Charitable	501(c)3	General support	1,000
A Safe Place PO Box 23006 Oakland, CA 94623	Charitable	501(c)3	General support	2,000
Alameda County Library Foundaiton 2450 Stevenson Blvd Fremont, CA 94538	Charitable	501(c)3	Homework Center	4,500
Alive & Free PO Box 884463 San Francisco, CA 94188	Charitable	501(c)3	Alameda Co Juvenile	2,000
Ann Martin Center 1375 55th Street Emeryville, CA 94608	Charitable	501(c)3	Learning Prog	3,000
Aspiranet 400 Oyster Point Blvd Ste 501 So San Francisco, CA 94080	Charitable	501(c)3	Experience Corps	2,000
Build Opp for Self Sufficiency 2065 Kittredge Street Berkeley, CA 94704	Charitable	501(c)3	Children's Learning	3,000
California Assoc of Student Council 1212 Preservation Park Way Oakland, CA 94612	Charitable	501(c)3	Leadership School	3,000
Cazadero Performing Arts Camp PO Box 7908 Berkeley, CA 94707	Charitable	501(c)3	Camperships	3,000
CC Interfaith Transitional Housing 1815 Arnold Drive Martinez, CA 94553	Charitable	501(c)3	General support	4,000
Children of Faith Missions PO Box 3453 Walnut Creek, CA 94598	Charitable	501(c)3	M McClure Mission	1,560
Childrens Skin Disease Found 1600 So Main Street Walnut Creek, CA 94596	Charitable	501(c)3	Camperships	3,000
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Christian Child Care Coalition 4102 NW Dondee Lane Topeka,KS 66618	Charitable	501(c)3	Believe Coloring	3,000
Community Alliance for Learning 1191 Solano Ave Albany,CA 94706	Charitable	501(c)3	Writer/Coach	2,500
Community Hospice of Texas 6100 Western Place 105 Fort Worth,TX 76107	Charitable	501(c)3	Memorial gift	500
Contra Costa College Memorial 2600 Mission Bell Drive San Pablo,CA 94806	Charitable	501(c)3	General support	2,500
Contra Costa Crisis Center 307 Lennon Lane Walnut Creek,CA 94598	Charitable	501(c)3	General support	2,000
Creative Growth Center 355 24th Street Oakland,CA 94612	Charitable	501(c)3	Saturday Art Program	2,000
Crisis Support Services of Alameda PO Box 3120 Oakland,CA 94609	Charitable	501(c)3	General support	3,000
Cristo Rey Jesuit High School 1390 Five Wounds Lane San Jose,CA 95136	Charitable	501(c)3	General support	500
Crohns & Collitis Foundation 120 Broadway Ste 1050A New York,NY 10271	Charitable	501(c)3	General support	1,695
Diabetic Youth Foundation 5167 Clayton Road Concord,CA 94521	Charitable	501(c)3	General support	2,500
East Bay Community Foundation 200 Frank H Ogawa Plaza Oakland,CA 94612	Charitable	501(c)3	Acalanes HS	250
Hayward Youth Academy 1065 A Street 204 Hayward,CA 94544	Charitable	501(c)3	General support	500
Heifer International Foundation 1 World Avenue Little Rock,AR 72202	Charitable	501(c)3	General support	500
Holy Names University 3500 Mountain Blvd Oakland,CA 94619	Charitable	501(c)3	Sister Fellowship	6,000
Homeward Bound Golden Retriever 7495 Natomas Road Elverta,CA 95626	Charitable	501(c)3	General support	500
Total  3a				1,400,000

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Hope 4 the Heart 22035 Meekland Avenue Hayward,CA 94541	Charitable	501(c)3	General support	3,000
In Motion Ministries Inc 15808 County Road 70 Greeley,CO 80631	Charitable	501(c)3	General support	500
John Muir Health Foundation 1400 Treat Blvd Ste C607 Walnut Creek,CA 94597	Charitable	501(c)3	Caring Hands	2,500
Love-A-Child Missions 2279 Willow Pass Road Bay Point,CA 94565	Charitable	501(c)3	General support	5,000
The Mentoring Center 672 - 13th St Ste 200 Oakland,CA 94612	Charitable	501(c)3	Transforative	2,000
Mercy Housing California 1999 Broadway Ste 1000 Denver,CO 80202	Charitable	501(c)3	Resident Service	5,000
Music & Arts Inc PO Box 27107 Oakland,CA 94602	Charitable	501(c)3	Love Fellowship	5,000
Natl Council of US Society of St 2210 Gladstone Drive Pittsburgh,CA 94565	Charitable	501(c)3	Various programs	10,000
New Christ Memorial Church 13333 Vaughn Street San Fernando,CA 91340	Charitable	501(c)3	General support	1,000
New Life Church 2501 Danville Blvd Alamo,CA 94507	Charitable	501(c)3	General support	1,000
Northbay Healthcare Foundation 4520 Business Center Drive Fairfield,CA 94534	Charitable	501(c)3	Memorium Kildru	1,000
Oakland Digital Arts & Literacy Ctr 1224 Harrison Street Oakland,CA 94612	Charitable	501(c)3	Inspire Oakland 2	5,000
Oakland Interfaith Gospel Choir PO Box 28732 Oakland,CA 94604	Charitable	501(c)3	General support	2,500
Pi Beta Phi Foundation PO Box 801867 Kansas City,MO 64180	Charitable	501(c)3	General support	1,000
Placer County Sheriffs Dept Search & Res 2929 Richardson Drive Auburn,CA 95603	Charitable	501(c)3	General support	300
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Project Peace East Bay 2138 Cedar Street Berkeley, CA 94709	Charitable	501(c)3	General support	5,000
Radix Magazine 2019 Durant Avenue Berkeley, CA 94704	Charitable	501(c)3	Print Expenses	1,500
Reading Partners 180 Grand Avenue 800 Oakland, CA 94612	Charitable	501(c)3	General support	4,000
Rising Sun Energy Center 2998 San Pablo Berkeley, CA 94702	Charitable	501(c)3	Green Workforce	5,000
San Leandro Boys & Girls Club 401 Marina Blvd San Leandro, CA 94577	Charitable	501(c)3	Positive Life Skill	2,500
San Ramon Valley Educ Fund 100 Wilson Road Alamo, CA 94507	Charitable	501(c)3	Various programs	780
San Ramon Valley HS Academic 501 Danville Blvd Danville, CA 94526	Charitable	501(c)3	General support	325
San Ramon Valley HS Athletic 501 Danville Blvd Danville, CA 94526	Charitable	501(c)3	Various programs	2,200
Shelter Inc of Contra Costa County 1815 Arnold Drive Martinez, CA 94553	Charitable	501(c)3	Various programs	5,250
Sierra Service Project PO Box 13009 Sacramento, CA 95813	Charitable	501(c)3	Camperships	2,000
Sister 4 Sister PO Box 1651 Antioch, CA 94509	Charitable	501(c)3	General support	1,500
The Springstone School 1035 Carol Lane Lafayette, CA 94549	Charitable	501(c)3	General support	2,500
The Stanford Magazine 326 Galvez Street Stanford, CA 94305	Charitable	501(c)3	General support	250
The Stanford Review 326 Galvez Street Stanford, CA 94305	Charitable	501(c)3	General support	250
Teen Esteem PO Box 966 Danville, CA 94526	Charitable	501(c)3	General support	3,000
Total  3a				1,400,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Tides Cener The Presidio 1014 Tomey Avenue San Francisco, CA 94129	Charitable	501(c)3	Boost! West Oakland	4,000
Truckee Tahoe Community Foundation 11071 Donner Pass Road Truckee, CA 96161	Charitable	501(c)3	General support	1,000
Trust in Education 985 Moraga Road Ste 207 Lafayette, CA 94549	Charitable	501(c)3	General support	500
Veterans Memorial Building PO Box 1092 Danville, CA 94526	Charitable	501(c)3	General support	1,000
WCC Salesian Boys & Girls Club 2801 Moran Avenue Richmond, CA 94804	Charitable	501(c)3	General support	1,500
Womens Cancer Resource Center 5741 Telegraph Avenue Oakland, CA 94609	Charitable	501(c)3	Swim a Mile	500
Women on the Way Recovery Center 20424 Haviland Avenue Hayward, CA 94541	Charitable	501(c)3	General support	3,500
Total				1,400,000

TY 2014 Accounting Fees Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 14000265

Software Version: 2014v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Harrison Accounting Group	11,211	561	0	10,650

TY 2014 Investments - Other Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 14000265**Software Version:** 2014v5.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Vanguard Group	FMV	26,503,783	26,503,783
American Funds	FMV	1,424,535	1,424,535

TY 2014 Land, Etc. Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 14000265

Software Version: 2014v5.0

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	64,316	64,316		

TY 2014 Other Expenses Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 14000265**Software Version:** 2014v5.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank charges	25	1		24
Dues & subscriptions	300	15		285
Event expense	10,198	510		9,688
Insurance	5,555	278		5,277
Office supplies	3,116	156		2,960
Repairs & maintenance	1,262	63		1,199
Telephone	2,801	140		2,661

TY 2014 Other Increases Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 14000265

Software Version: 2014v5.0

Description	Amount
Change in FMV of investments	1,006,722

TY 2014 Other Liabilities Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 14000265**Software Version:** 2014v5.0

Description	Beginning of Year - Book Value	End of Year - Book Value
Payroll tax payable	2,689	2,711
Rounding	1	

TY 2014 Taxes Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 14000265**Software Version:** 2014v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise tax on investment	23,790			23,790
Foreign taxes on dividend income	2,136	2,136		
Payroll taxes	3,055	153		2,902
Personal property taxes	167	8		159
RRF-1 & Secty of State fee	170	9		161
State Form 199 fee	10	1		9