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For calendar year 2014, or tax year beginning 11-01-2014 , and ending 10-31-2015

Name of foundation Arthur & Charlotte Zitrin Foundation		A Employer identification number 26-4299156	
Number and street (or P O box number if mail is not delivered to street address) 333 Green Street		B Telephone number (see instructions) (415) 274-9976	
City or town, state or province, country, and ZIP or foreign postal code San Francisco, CA 94133		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) ☒ \$ 5,804,625		J Accounting method ☐ Cash ☐ Accrual ☒ Other (specify) <u>Mod Cash</u> (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	7,037	7,037		
	4 Dividends and interest from securities.	119,044	119,044		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	336,014			
	b Gross sales price for all assets on line 6a <u>2,946,112</u>				
	7 Capital gain net income (from Part IV, line 2) . . .		336,014		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	462,095	462,095		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	50,000			50,000
	14 Other employee salaries and wages	20,000			20,000
	15 Pension plans, employee benefits	4,627			4,627
	16a Legal fees (attach schedule)	1,803			1,803
	b Accounting fees (attach schedule)	10,766			10,766
	c Other professional fees (attach schedule)	19,223	19,223		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	22,796	324		5,929
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	62			62
	22 Printing and publications				
	23 Other expenses (attach schedule)	7,694			7,694
	24 Total operating and administrative expenses. Add lines 13 through 23	136,971	19,547		100,881
	25 Contributions, gifts, grants paid	295,647			295,647
	26 Total expenses and disbursements. Add lines 24 and 25	432,618	19,547		396,528
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	29,477			
	b Net investment income (if negative, enter -0-)		442,548		
	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	31,561	105,814	105,814
	2	Savings and temporary cash investments	303,685	1,358,577	1,358,577
	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	75	75	75
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	3,022,205	1,924,896	2,653,945
	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)	1,793,735	1,808,699	1,686,214
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)		1	
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,151,261	5,198,062	5,804,625
	17	Accounts payable and accrued expenses	29,370	46,694	
	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 ▶ _____)			
Net Assets or Fund Balances	23	Total liabilities (add lines 17 through 22)	29,370	46,694	
		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	5,121,891	5,151,368	
	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)	5,121,891	5,151,368	
	31	Total liabilities and net assets/fund balances (see instructions)	5,151,261	5,198,062	

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 5,121,891
2	Enter amount from Part I, line 27a	2 29,477
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	4 5,151,368
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 5,151,368

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	Sales of Publicly Traded Securities	P	2001-01-01	2014-04-01
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 2,946,112		2,610,098	336,014
b			
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			336,014
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	336,014
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	623,635	6,247,957	0.09981
2012	319,063	4,697,084	0.06793
2011	230,542	4,223,906	0.05458
2010	191,635	4,526,829	0.04233
2009	192,468	4,256,719	0.04522

2	Total of line 1, column (d).	2	0.30987
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	0.06197
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	6,181,357
5	Multiply line 4 by line 3.	5	383,083
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	4,425
7	Add lines 5 and 6.	7	387,508
8	Enter qualifying distributions from Part XII, line 4.	8	396,528

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 ☐ 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		14,425	
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.		34,425	
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-		54,425	
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014		6a	4,384
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	4,384
8		Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached		8	26
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	67
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11		Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ Refunded ☐		11	

Part VII-AStatements Regarding Activities

1a		During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		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 ☐ \$ (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, ☐ NV				
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 Richard Zitrin Telephone no (415) 274-9976 Located at 333 Green Street San Francisco CA ZIP+4 94133			
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?			
	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?			
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?			
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
Richard Zitrin	President	50,000		
333 Green Street	8 00			
San Francisco, CA 94113				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 Grant making for direct charitable activities	396,528
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3.	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	5,894,998
b	Average of monthly cash balances.	1b	380,491
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	6,275,489
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	6,275,489
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	94,132
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,181,357
6	Minimum investment return. Enter 5% of line 5.	6	309,068

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	309,068
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	4,425
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,425
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	304,643
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	304,643
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	304,643

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	396,528
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	396,528
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	4,425
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	392,103
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				304,643
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.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				238,822
f Total of lines 3a through e.	238,822			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 396,528				
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.				304,643
e Remaining amount distributed out of corpus	91,885			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	330,707			
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) . . .				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	330,707			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				238,822
e Excess from 2014. . . .				91,885

Part XIV

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. . . .

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

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

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

1 Information Regarding Foundation Managers:

■ 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))

• 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 email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	295,647
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

[illegible]

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

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

1c

No

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

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

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

*****	2016-04-01	*****
Signature of officer or trustee	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.

* * * * *

2016-04-01

* * * * *

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 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>				
San Francisco Museum of Modern Art 151 3rd Street San Francisco, CA 94103	none	509(a)	General Support	3,500
Alliance for Justice 436 14th St 425 Oakland, CA 94612	None	509(a)	General Support	5,000
Metropolitan Museum of Art 1000 5th Avenue New York, NY 10029	None	509(a)	General Support	1,800
AIDS LifeCycle 1035 Market Street Suite 400 San Francisco, CA 94103	None	509(a)	General Support	100
Workshop Theater Company 312 West 35th Street 4th Floor New York, NY 10018	None	509(a)	General Support	1,000
ACT 30 Grant Avenue 6th Floor San Francisco, CA 94108	None	509(a)	General Support	1,200
Equal Justice Society 260 California Street Suite 700 San Francisco, CA 94111	None	509(a)	General Support	3,000
SF Child Abuse Prevention 1757 Waller Street San Francisco, CA 94117	None	509(a)	General Support	3,000
Hebrew Immigrant Aid Society 333 Seventh Avenue 16th floor New York, NY 10001	None	509(a)	General Support	500
Es Nuestras Historia 2007 Franklin St San Francisco, CA 94109	None	509(a)	General Support	508
Public Citizen 1600 20th Street NW Washington, DC 20003	None	509(a)	General Support	2,500
Hastings Public Interest Law Fdn PO Box 425635 San Francisco, CA 94101	None	509(a)	General Support	1,000
SF Jazz Three Embarcadero Center San Francisco, CA 94111	None	509(a)	General Support	10,000
LAS Employment Law Center 180 Montgomery St Suite 600 San Francisco, CA 91404	None	509(a)	General Support	2,000
WNYCWQXRNJPRNYPR 160 Varick St New York, NY 10013	None	509(a)	General Support	250
Total  3a				295,647

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>				
Community Music Center 544 Capp Street San Francisco, CA 94110	None	509(a)	General Support	3,575
Grafton County Sr Citizens Council 10 Campbell St Lebanon, NH 03766	None	509(a)	General Support	250
American Comm for the Weizmann Inst 300 Montgomery 615 San Francisco, CA 94104	None	509(a)	General Support	1,000
American Constitution Society for L 1333 H St NW Washington, DC 20005	None	509(a)	General Support	2,500
Amnesty International 350 Sansome St 120 San Francisco, CA 94104	None	509(a)	General Support	250
American Society for Suicide Preven 120 Wall Street 29th Floor New York, NY 10005	None	509(a)	General Support	250
Bay Area Legal Aid 1035 Market St 6 San Francisco, CA 94103	None	509(a)	General Support	1,000
Breast Cancer Action 657 Mission St 302 San Francisco, CA 94105	None	509(a)	General Support	2,000
Boys and Girls Club of SF 55 Hawthorne Street Suite 600 San Francisco, CA 94105	None	509(a)	General Support	250
California CASA Association 660 13th Street Suite 300 Oakland, CA 94612	None	509(a)	General Support	500
Center for Auto Safety 1825 Connecticut Ave NW Suite 330 Washington, DC 20009	None	509(a)	General Support	2,500
Creativity Explored 3245 16th Street San Francisco, CA 94103	none	509(a)	General Support	500
Consumer Reports 101 Truman Ave Yonkers, NY 10703	None	509(a)	General Support	2,500
Edible Schoolyard 1517 Shattuck Avenue Berkeley, CA 94709	None	509(a)	General Support	1,000
Healthright 360 1735 Mission St San Francisco, CA 94103	None	509(a)	General Support	250
Total  3a				295,647

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>				
Common Cause 1133 19th Street NW 9th Floor Washington, DC 20036	None	509(a)	General Support	500
East Bay Community Law Center 2921 Adeline Street Berkeley, CA 94703	None	509(a)	General Support	11,500
BASF Foundation 301 Battery Street Third Floor San Francisco, CA 94111	none	509(a)	General Support	82,500
Justice at Stake 717 D Street NW Suite 203 Washington, DC 20004	None	509(a)	General Support	500
Lawyers Committee for Civil Rights 131 Steuart St Suite 400 San Francisco, CA 94105	None	509(a)	General Support	250
Larkin Street Youth Svcs 701 Sutter Street Suite 2 San Francisco, CA 94109	None	509(a)	General Support	1,000
Marron House 2124 N 6th Street Concord, CA 94519	None	509(a)	General Support	1,000
Merola Opera Program 301 Van Ness Ave San Francisco, CA 94102	None	509(a)	General Support	2,000
Nature Conservancy 201 Mission Street 4th Floor San Francisco, CA 94105	None	509(a)	General Support	5,000
Project Open Hand 730 Polk Street San Francisco, CA 94109	None	509(a)	General Support	500
SF SPCA 201 Alabama Street San Francisco, CA 94103	None	509(a)	General Support	250
NRDC 40 West 20th Street New York, NY 10011	None	509(a)	General Support	5,000
SF Suicide Prevention PO Box 191350 San Francisco, CA 94119	None	509(a)	General Support	250
SF Zen Center 300 Page Street San Francisco, CA 94102	None	509(a)	General Support	250
Simon Wiesenthal Center 1399 South Roxbury Drive Los Angeles, CA 90035	None	509(a)	General Support	500
Total  3a				295,647

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>				
Texas Family Council 4920 N Interstate Hwy 35 Austin,TX 78751	None	509(a)	General Support	1,000
We Players 1162 14th Avenue San Francisco,CA 94122	None	509(a)	General Support	1,000
Alonzo King Ballet 26 7th St 5 San Francisco,CA 94103	None	509(a)	General Support	1,000
Stepping Stone 350 Golden Gate Ave 3 San Francisco,CA 94102	None	509(a)	General Support	500
SF Food Bank 900 Pennsylvania Avenue San Francisco,CA 94107	None	509(a)	General Support	500
Golden Gate National Parks Conserva Building 201 Fort Mason San Francisco,CA 94123	None	509(a)	General Support	250
Bay Area Urban Debate League 287 7th St Oakland,CA 94612	None	509(a)	General Support	500
Congregation Beth Shalom 301 14th Avenue San Francisco,CA 94118	None	509(a)	General Support	1,950
Galileo Academy 1150 Francisco St San Francisco,CA 94109	None	509(a)	General Support	500
Helpers 900 North Point Street San Francisco,CA 94109	None	509(a)	General Support	500
Friends of the Urban Forest 1007 General Kennedy Ave Suite 1 San Francisco,CA 94129	None	509(a)	General Support	500
SF Jewish Film Institute 145 9th St 200 San Francisco,CA 94103	None	509(a)	General Support	1,000
Oberlin College 50 West Lorain Street Oberline,OH 44074	None	509(a)	General Support	40,000
Roundabout Theater 231 West 39th Street Suite 1200 New York,NY 10018	None	509(a)	General Support	2,500
Shanti 730 Polk Street San Francisco,CA 94109	None	509(a)	General Support	3,000
Total  3a				295,647

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>				
Enterprise for High School Students 200 Pine Street 6th Floor San Francisco, CA 94104	None	509(a)	General Support	1,250
COFAM De Young 50 Hagiwara Tea Garden Drive San Francisco, CA 94118	None	509(a)	General Support	249
Sierra Club 2530 San Pablo Ave I Berkeley, CA 94702	None	509(a)	General Support	1,000
SF Ballet 200 Pine Street 6th Floor San Francisco, CA 94104	None	509(a)	General Support	2,500
Association for Community Counselin 4731 W Atlantic Avenue Suite B-13 Del Ray Beach, FL 33445	None	509(a)	General Support	500
New China Education Foundation 838 Grant Avenue Mailbox 41 San Francisco, CA 94108	None	509(a)	General Support	2,000
Southern Exposure 3030 20th St San Francisco, CA 94110	None	509(a)	General Support	1,000
ALRP Aids Legal Referral 1663 Mission Street Ste 500 San Francisco, CA 94103	None	509(a)	General Support	1,500
Artspan 934 Brannan Stret 2nd Floor San Francisco, CA 94103	None	509(a)	General Support	500
Bay Area Community Law Fdn 558 Capp Street San Francisco, CA 94110	None	509(a)	General Support	500
Blue Energy Group 972 Mission Street Suite 500 San Francisco, CA 94103	None	509(a)	General Support	500
Brady Campaign DC 1225 Eye Street NW - Suite 100 Washington, DC 20005	None	509(a)	General Support	250
Center for Investigative Reporting 1400 65th Street Ste 200 Emeryville, CA 94608	None	509(a)	General Support	500
CPMC Foundation Castro Duboce Streets San Francisco, CA 94114	None	509(a)	General Support	500
Doctors without Borders 333 7th Ave New York, NY 10001	None	509(a)	General Support	1,000
Total  3a				295,647

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				
Equal Justice Initiative 122 Commerce Street Montgomery,AL 36104	None	509(a)	General Support	1,000
Fairwarningorg 17514 Ventura Blvd Suite 103 Encino,CA 91316	None	509(a)	General Support	1,000
Integral Yoga Teachers Association 108 Yogaville Way Buckingham,VA 23921	None	509(a)	General Support	500
Jewish Family and Childern Services 2150 Post Street San Francisco,CA 94115	None	509(a)	General Support	2,000
Juma Ventures 131 Steuart St 201 San Francisco,CA 94105	None	509(a)	General Support	515
KCSM 1700 West Hillsdale Boulevard San Mateo,CA 94402	None	509(a)	General Support	1,000
Legal Assistance for Seniors 1970 Broadway Suite 300 Oakland,CA 94612	None	509(a)	General Support	1,000
National Center for Youth Law 405 15 Street 15th Floor Oakland,CA 94612	None	509(a)	General Support	250
National Consumers League 1701 K Street NW Suite 1200 Washington,DC 20006	None	509(a)	General Support	2,500
National Multiple Sclerosis Society 1700 Owens St San Francisco,CA 94107	None	509(a)	General Support	1,000
Not For Sale Campaign 270 Capistrano Road Suite 2 Half Moon Bay,CA 94019	None	509(a)	General Support	7,500
Oasis Village 11350 Lee Avenue Adelanto,CA 92301	None	509(a)	General Support	500
ODCDance 351 Shotwell Street San Francisco,CA 94110	None	509(a)	General Support	1,500
Pathways for Kids 331 Filbert Street San Francisco,CA 94133	None	509(a)	General Support	1,000
Paws 3170 23rd Street San Francisco,CA 94110	None	509(a)	General Support	250
Total  3a				295,647

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>				
Plug in America 2370 Market Street 419 San Francisco, CA 94114	None	509(a)	General Support	500
Southern Poverty Law Center 400 Washington Avenue Montgomery, AL 36104	None	509(a)	General Support	250
Visual Understanding In Education 119 West 23rd St Suite 905 New York, NY 10011	None	509(a)	General Support	1,000
Western Ctr on Law Poverty 449 Fifteenth Street 301 Oakland, CA 94612	None	509(a)	General Support	1,000
Public Justice Foundation 555 12th Street Suite 1230 Oakland, CA 94607	None	509(a)	General Support	5,000
Womens Community Clinic 1833 Fillmore St San Francisco, CA 94115	None	509(a)	General Support	500
Project Avery 385 Bel Marin Keys Blvd Suite G Novato, CA 94949	None	509(a)	General Support	1,500
J Street Education Fund PO Box 66073 Washington, DC 20035	None	509(a)	General Support	2,500
Worksafe INC 55 Harrison Street Suite 400 Oakland, CA 94607	None	509(a)	General Support	250
Sulha Peace Fund PO Box 29242 San Francisco, CA 94129	None	509(a)	General Support	2,500
Contemporary Jewish Museum 736 Mission Street San Francisco, CA 94103	None	509(a)	General Support	1,000
SF Conservatory of Music 50 Oak Street San Francisco, CA 94102	None	509(a)	General Support	25,000
Total  3a				295,647

TY 2014 Accounting Fees Schedule**Name:** Arthur & Charlotte Zitrin Foundation**EIN:** 26-4299156**Software ID:** 14000265**Software Version:** 2014v6.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bookkeeping	1,946	0	0	1,946
Tax Preparation	8,820	0	0	8,820

TY 2014 Legal Fees Schedule

Name: Arthur & Charlotte Zitrin Foundation

EIN: 26-4299156

Software ID: 14000265

Software Version: 2014v6.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal Service Fees	1,803	0	0	1,803

TY 2014 Other Expenses Schedule

Name: Arthur & Charlotte Zitrin Foundation

EIN: 26-4299156

Software ID: 14000265

Software Version: 2014v6.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Assistant	1,728			1,728
Bank and Credit Card Charges	105			105
Filing Fees	235			235
Miscellaneous	4,959			4,959
Other Administrative Expenses	55			55
Payroll Service Fee	612			612

TY 2014 Other Professional Fees Schedule

Name: Arthur & Charlotte Zitrin Foundation

EIN: 26-4299156

Software ID: 14000265

Software Version: 2014v6.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Management	19,223	19,223	0	0

TY 2014 Taxes Schedule**Name:** Arthur & Charlotte Zitrin Foundation**EIN:** 26-4299156**Software ID:** 14000265**Software Version:** 2014v6.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Taxes	16,543			
Foreign Taxes W/H	324	324		
Payroll	5,929			5,929