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EXTENDED TO AUGUST 15, 2016

Return of Private Foundation

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

OMB No 1545-0052

Form 990-PF

Department of the Treasury
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.

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

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning

, and ending

Name of foundation MCMURTRY FAMILY FOUNDATION OF 2003		A Employer identification number 51-0478343
Number and street (or P.O. box number if mail is not delivered to street address) 101 WEST VENICE AVENUE	Room/suite	B Telephone number (941) 485-8220
City or town, state or province, country, and ZIP or foreign postal code VENICE, FL 34285		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 ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 18,073,474.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(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	1,059,578.			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	541,549.	541,549.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-5,847.			
	b Gross sales price for all assets on line 6a	598,485.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	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)					
11 Other income					
12 Total. Add lines 1 through 11	1,595,280.	541,549.	0.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	STMT 2 9,699.	2,425.	0.	2,425.
	c Other professional fees	STMT 3 66,536.	66,536.	0.	0.
	17 Interest				
	18 Taxes	STMT 4 6,795.	6,795.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 Total operating and administrative expenses. Add lines 13 through 23	83,030.	75,756.	0.	2,425.
	25 Contributions, gifts, grants paid	1,137,000.			1,137,000.
26 Total expenses and disbursements. Add lines 24 and 25	1,220,030.	75,756.	0.	1,139,425.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	375,250.				
b Net investment income (if negative, enter -0-)		465,793.			
c Adjusted net income (if negative, enter -0-)			0.		

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11-24-15

LHA For Paperwork Reduction Act Notice, see instructions.

2

Form 990-PF (2015)

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2015.03040 MCMURTRY FAMILY FOUNDATION 2153_0_1

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		513,582.	399,126.	399,126.
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶ 1,200.				
		Less: allowance for doubtful accounts ▶			1,200.	1,200.
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 5	8,043,959.	8,720,253.	12,835,557.	
	c	Investments - corporate bonds STMT 6	5,042,982.	4,855,194.	4,837,591.	
	Liabilities	11	Investments - land, buildings, and equipment: basis ▶			
		Less accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other				
14		Land, buildings, and equipment: basis ▶				
		Less accumulated depreciation ▶				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	13,600,523.	13,975,773.	18,073,474.	
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)	0.	0.			
24	Foundations that follow SFAS 117, check here ▶ ☐					
25	Unrestricted					
26	Temporarily restricted					
27	Permanently restricted					
28	Foundations that do not follow SFAS 117, check here ▶ ☒					
29	Capital stock, trust principal, or current funds	0.	0.			
30	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.			
31	Retained earnings, accumulated income, endowment, or other funds	13,600,523.	13,975,773.			
32	Total net assets or fund balances	13,600,523.	13,975,773.			
33	Total liabilities and net assets/fund balances	13,600,523.	13,975,773.			

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	13,600,523.
2	Enter amount from Part I, line 27a	2	375,250.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	13,975,773.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	13,975,773.

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 CHARLES SCHWAB (#5106-6173) - SEE ATTACHED	P	VARIOUS	12/31/15
b CHARLES SCHWAB (#5106-6173) - SEE ATTACHED	P	VARIOUS	12/31/15
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 427,723.		428,046.	-323.
b 170,762.		176,286.	-5,524.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-323.
b			-5,524.
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	-5,847.
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). If (loss), enter -0- in Part I, line 8	3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2014	864,194.	18,468,778.	.046792
2013	974,554.	15,342,675.	.063519
2012	924,015.	13,207,377.	.069962
2011	802,591.	12,691,424.	.063239
2010	614,217.	11,055,308.	.055559

2 Total of line 1, column (d)	2	.299071
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	.059814
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	18,882,430.
5 Multiply line 4 by line 3	5	1,129,434.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,658.
7 Add lines 5 and 6	7	1,134,092.
8 Enter qualifying distributions from Part XII, line 4	8	1,139,425.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	4,658.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	4,658.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	4,658.
6	Credits/Payments:		
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	15,895.
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	15,895.
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	11,237.
11	Enter the amount of line 10 to be: Credited to 2016 estimated tax ☒ 11,237. Refunded ☒ 0.	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
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?		X
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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ CA, FL		
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	X	
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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	X	

STMT 7

Form 990-PF (2015)

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		X
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)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	X	
14 The books are in care of ▶ TRACY HOM Telephone no. ▶ (415) 362-5990 Located at ▶ 50 CALIFORNIA STREET, SUITE 3550, SAN FRANCISCO, ZIP+4 ▶ 94111		
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 N/A		
16 At any time during calendar year 2015, 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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		X

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 ▶ N/A	1b	
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 2015?	1c	X
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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ▶ _____, _____, _____, _____ 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.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ _____, _____, _____, _____	2b	
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 2015 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 4942(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 2015) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
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 2015?	4b	X

Form 990-PF (2015)

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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ 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

6b

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

X

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

7b

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

N/A

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.

(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 STATEMENT 8		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

Form 990-PF (2015)

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. 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

0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 THE PURPOSE OF THE FOUNDATION IS TO PROVIDE SUPPORT TO PUBLIC AND CHARITABLE ORGANIZATIONS IN THEIR CHARITABLE, RELIGIOUS, SCIENTIFIC, LITERARY OR EDUCATIONAL PURPOSES.	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

Form 990-PF (2015)

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	18,789,611.
b	Average of monthly cash balances	1b	380,369.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	19,169,980.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	19,169,980.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	287,550.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	18,882,430.
6	Minimum investment return. Enter 5% of line 5	6	944,122.

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	944,122.
2a	Tax on investment income for 2015 from Part VI, line 5	2a	4,658.
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	4,658.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	939,464.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	939,464.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	939,464.

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	1,139,425.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,139,425.
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	5	4,658.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,134,767.

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.

Form 990-PF (2015)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				939,464.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2015:				
a From 2010	67,818.			
b From 2011	173,440.			
c From 2012	270,800.			
d From 2013	241,562.			
e From 2014				
f Total of lines 3a through e	753,620.			
4 Qualifying distributions for 2015 from Part XII, line 4: ► \$ 1,139,425.				
a Applied to 2014, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2015 distributable amount				939,464.
e Remaining amount distributed out of corpus	199,961.			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	953,581.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7	67,818.			
9 Excess distributions carryover to 2016 Subtract lines 7 and 8 from line 6a	885,763.			
10 Analysis of line 9:				
a Excess from 2011	173,440.			
b Excess from 2012	270,800.			
c Excess from 2013	241,562.			
d Excess from 2014				
e Excess from 2015	199,961.			

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				
FOUNDATION FOR THE FUTURE, M-A P.O. BOX 1228 MENLO PARK, CA 94026		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	25,000.
EXPLORATORIUM PIER 15, THE EMBARCADERO SAN FRANCISCO, CA 94111		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	100,000.
MONTEREY BAY AQUARIUM 886 CANNERY ROW MONTEREY, CA 93940		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	10,000.
OREGON SHAKESPEARE FESTIVAL 15 S PIONEER ST ASHLAND, OR 97520		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	75,000.
WILDAID 333 PINE ST #3 SAN FRANCISCO, CA 94104		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	10,000.
Total SEE CONTINUATION SHEET(S) ▶ 3a				1,137,000.
b Approved for future payment				
NONE				
Total				0.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BERKELEY ENGINEERING FUND 308 MCLAUGHLIN HALL #1722 BERKELEY, CA 94720		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	110,000.
COLLEGE OF ENVIRONMENTAL DESIGN ANNUAL FUND 230 WURSTER HALL #1820 BERKELEY, CA 94720		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	10,000.
COUNCIL ON FOREIGN RELATIONS 58 EAST 68TH STREET NEW YORK, NY 10065		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	2,000.
GLOBAL HERITAGE FUND 220 MONTGOMERY ST #1020 SAN FRANCISCO, CA 94104		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	65,000.
HOOVER INSTITUTION 434 GALVEZ MALL STANFORD UNIVERSITY PALO ALTO, CA 94305		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	2,000.
LUCILLE PACKARD FOUNDATION FOR CHILDREN'S HEALTH 400 HAMILTON AVE #340 PALO ALTO, CA 94301		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	100,000.
LUCILLE PACKARD FOUNDATION FOR CHILDREN'S HEALTH 400 HAMILTON AVE #340 PALO ALTO, CA 94301		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	2,500.
READING PARTNERS 180 GRAND AVE #800 OAKLAND, CA 94612		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	5,000.
STANFORD FUND P.O. BOX 20466 STANFORD, CA 94309		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	2,500.
STUDENTS MATTER 325 SHARON PARK DRIVE #521 MENLO PARK, CA 94025		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	10,000.
Total from continuation sheets				917,000.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
EMBRACE GLOBAL 1611 TELEGRAPH AVENUE, SUITE 1420 OAKLAND, CA 94612		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	25,000.
INTERNATIONAL RESCUE COMMITTEE 405 14TH STREET #1415 OAKLAND, CA 94612		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	25,000.
OREGON SHAKESPEARE FESTIVAL 15 S PIONEER ST ASHLAND, OR 97520		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	25,000.
CANARY FOUNDATION 3155 PORTER DR PALO ALTO, CA 94304		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	100,000.
CARNEGIE INSTITUTION 1530 P ST NW WASHINGTON, DC 20005		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	10,000.
COMPUTER HISTORY MUSEUM 1401 N SHORELINE BLVD MOUNTAIN VIEW, CA 94043		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	21,000.
EASTSIDE COLLEGE PREPARATORY HIGH SCHOOL 1041 MYRTLE ST EAST PALO ALTO, CA 94303		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	50,000.
HABITAT FOR HUMANITY 500 WASHINGTON ST #250 SAN FRANCISCO, CA 94111		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	100,000.
KQED 2601 MARIPOSA ST SAN FRANCISCO, CA 94110		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	2,000.
MENLO PARK ATHERTON EDUCATION FOUNDATION 181 ENCINAL AVE ATHERTON, CA 94027		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PENINSULA OPEN SPACE TRUST 222 HIGH ST PALO ALTO, CA 94301		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	10,000.
STANFORD FUND P.O. BOX 20466 STANFORD, CA 94309		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	10,000.
STANFORD UNIVERSITY P.O. BOX 20466 STANFORD, CA 94309		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	10,000.
STANFORD UNIVERSITY P.O. BOX 20466 STANFORD, CA 94309		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	5,000.
STANFORD UNIVERSITY P.O. BOX 20466 STANFORD, CA 94309		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	10,000.
STUDENTS RISING ABOVE P.O. BOX 29174 SAN FRANCISCO, CA 94129		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	50,000.
VILLAGE ENTERPRISE FUND 1161 CHERRY ST # G SAN CARLOS, CA 94070		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	25,000.
CANARY FOUNDATION 3155 PORTER DR PALO ALTO, CA 94304		PUBLIC CHARITY	TO FURTHER AND PROMOTE CHARITABLE EFFORTS	100,000.
UC REGENTS 1111 FRANKLIN ST., 12TH FLOOR OAKLAND, CA 94607		PUBLIC CHARITY	TO FURTHER AND PROMOTE EDUCATIONAL PURPOSES	25,000.
Total from continuation sheets				

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

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

[illegible]

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

- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**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.

Signature of officer or trustee

5/17/16
Date

PRESIDENT
Title

May the IRS discuss this return with the preparer shown below (see instr.)?

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

TRACY HOM

Preparer's signature

LLP

Date _____

5/17/19

Check ☐ if
self-employed

PTIN

P01085786

Firm's name ► **REALIZE CPA, LLP**

Firm's EIN ▶ 94-3145806

Firm's address ► 50 CALIFORNIA STREET, SUITE 3550
SAN FRANCISCO, CA 94111

Phone no. (415) 362-5990

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2015

Name of the organization

MCMURTRY FAMILY FOUNDATION OF 2003

Employer identification number

51-0478343

Organization type (check one).

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒

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

Special Rules

☐

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

Name of organization	Employer identification number
MCMURTRY FAMILY FOUNDATION OF 2003	51-0478343

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ANN KATHRYN MCMURTRY CHARITABLE LEAD TRUST OF 2003 3454 WINDHAM CIRCLE STOCKTON, CA 95209	\$ 1,059,578.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization

Employer identification number

MCMURTRY FAMILY FOUNDATION OF 2003

51-0478343

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed.

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

Employer identification number

51-0478343

Part III

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

Use duplicate copies of Part III if additional space is needed

Use duplicate copies of Part I if additional space is needed			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CHARLES SCHWAB CAPITAL GAIN DISTRIBUTIONS	200,082.	0.	200,082.	200,082.	200,082.
CHARLES SCHWAB DIVIDENDS (#5106-6173)	341,467.	0.	341,467.	341,467.	341,467.
TO PART I, LINE 4	541,549.	0.	541,549.	541,549.	541,549.

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	9,699.	2,425.	0.	2,425.
TO FORM 990-PF, PG 1, LN 16B	9,699.	2,425.	0.	2,425.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADVISORY FEES	66,536.	66,536.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	66,536.	66,536.	0.	0.

FORM 990-PF	TAXES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	6,795.	6,795.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	6,795.	6,795.	0.	0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	5
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
INVESTMENT - MUTUAL FUNDS	8,720,253.		12,835,557.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,720,253.		12,835,557.	

FORM 990-PF	CORPORATE BONDS		STATEMENT	6
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
INVESTMENT - BONDS	4,855,194.		4,837,591.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	4,855,194.		4,837,591.	

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT 7
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NAME OF CONTRIBUTOR	ADDRESS
ANN K. MCMURTRY CHARITABLE LEAD TRUST	3454 WINDHAM CIRCLE STOCKTON, CA 95209
BURTON & ANN MCMURTRY	620 SAND HILL ROAD #323F PALO ALTO, CA 94304

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 8
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN	EXPENSE CONTRIB	ACCOUNT
BURTON J. MCMURTRY 620 SAND HILL ROAD #323F PALO ALTO, CA 94304	TRUSTEE 1.00	0.	0.	0.	0.
ANN K. MCMURTRY 620 SAND HILL ROAD #323F PALO ALTO, CA 94304	TRUSTEE 1.00	0.	0.	0.	0.
CATHRYN MCMURTRY 800 HIGH STREET, APT 204 PALO ALTO, CA 94301	TRUSTEE 1.00	0.	0.	0.	0.
JOHN MCMURTRY 650 COTTON STREET MENLO PARK, CA 94025	TRUSTEE 1.00	0.	0.	0.	0.
JILL CHOATE 3454 WINDHAM CIRCLE STOCKTON, CA 95209	TRUSTEE 1.00	0.	0.	0.	0.
JILL A. LERVOLD 50 CALIFORNIA STREET, SUITE 3550 SAN FRANCISCO, CA 94111	TRUSTEE 1.00	0.	0.	0.	0.
ROBERT GOLDMAN 100 LARKSPUR LANDING CIRCLE, SUITE 112 LARKSPUR, CA 94939	TRUSTEE 1.00	0.	0.	0.	0.

MCMURTRY FAMILY FOUNDATION OF 2003

51-0478343

MICHAEL HARTLEY	TRUSTEE			
DKE, INC. 101 WEST VENICE AVENUE	1.00	0.	0.	0.
VENICE, FL 34285				

MICHAEL TILLMAN	TRUSTEE			
HAILE VILLAGE CTR., 5346 S.W. 91ST				
TERRACE	1.00	0.	0.	0.
GAINESVILLE, FL 32608				

TRACY HOM	TRUSTEE			
50 CALIFORNIA STREET, SUITE 3550	1.00	0.	0.	0.
SAN FRANCISCO, CA 94111				

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

0.	0.	0.
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