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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation LOWELL BERRY FOUNDATION		A Employer identification number 94-6108391	
Number and street (or P O box number if mail is not delivered to street address) 3685 Mt Diablo Blvd 351		Room/suite	B Telephone number (see instructions) (925) 284-4427
City or town, state or province, country, and ZIP or foreign postal code Lafayette, CA 94549			
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 26,528,340		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)			

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per (a) books	Net investment (b) income	Adjusted net (c) income	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	244,369			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	365	365	365	
	4 Dividends and interest from securities	565,572	565,572	565,572	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,076,177			
	b Gross sales price for all assets on line 6a 5,954,790				
	7 Capital gain net income (from Part IV, line 2) . . .		1,076,177		
	8 Net short-term capital gain			14,031	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	6,169	6,169		
	12 Total. Add lines 1 through 11	1,892,652	1,648,283	579,968	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages	37,640	1,882		35,758
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	12,435	622		11,813
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	38,472	282		38,190
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy	34,414	1,721		32,693
	21 Travel, conferences, and meetings.	94	5		89
	22 Printing and publications				
	23 Other expenses (attach schedule).	14,362	711		13,651
	24 Total operating and administrative expenses. Add lines 13 through 23	137,417	5,223		132,194
	25 Contributions, gifts, grants paid	1,409,000			1,409,000
	26 Total expenses and disbursements. Add lines 24 and 25	1,546,417	5,223		1,541,194
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	346,235			
	b Net investment income (if negative, enter -0-)		1,643,060		
c Adjusted net income (if negative, enter -0-)				579,968	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	50	50	50
	2	Savings and temporary cash investments	241,180	387,991	387,991
	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	4,210		
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans.			
	13	Investments—other (attach schedule)	27,928,318	26,140,299	26,140,299
	14	Land, buildings, and equipment basis ▶ 64,316 Less accumulated depreciation (attach schedule) ▶ 64,316			
15	Other assets (describe ▶ _____)				
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	28,173,758	26,528,340	26,528,340	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)	2,711	11,637	
	23	Total liabilities(add lines 17 through 22)	2,711	11,637	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	28,171,047	26,516,703	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances(see instructions)	28,171,047	26,516,703	
31	Total liabilities and net assets/fund balances(see instructions)	28,173,758	26,528,340		

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	28,171,047
2	Enter amount from Part I, line 27a	2	346,235
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	28,517,282
5	Decreases not included in line 2 (itemize) ▶ _____	5	2,000,579
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	26,516,703

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,076,177
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	14,031

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))
2014	1,525,949	27,634,987	0 05522
2013	1,416,066	25,505,481	0 05552
2012	1,366,830	23,447,032	0 05829
2011	1,388,635	23,641,609	0 05874
2010	1,393,589	22,669,291	0 06148

2	Total of line 1, column (d).	2	0 289244
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 057849
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	27,412,622
5	Multiply line 4 by line 3.	5	1,585,793
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	16,431
7	Add lines 5 and 6.	7	1,602,224
8	Enter qualifying distributions from Part XII, line 4.	8	1,541,194

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

Part VI

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

1a

Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1
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

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-)

3

Add lines 1 and 2.

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

24,000

b

Exempt foreign organizations—tax withheld at source

6b

c

Tax paid with application for extension of time to file (Form 8868).

6c

d

Backup withholding erroneously withheld

6d

7

Total credits and payments. Add lines 6a through 6d.

8

Enter any **penalty** for underpayment of estimated tax. Check here ☒ if Form 2220 is attached

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed**

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**.

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** **Refunded**

1	32,861
2	
3	32,861
4	
5	32,861
6a	24,000
6b	
6c	
6d	
7	24,000
8	156
9	9,017
10	
11	

Part VII-A

Statements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for 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.

1b

No

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?
If "Yes," attach a detailed description of the activities.

2

No

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?
If "Yes," attach the statement required by General Instruction T.

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

Yes

7

Did the foundation have at least \$5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*

7

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions)
 CA _____

b

If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation.*

8b

Yes

9

Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (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? Website address ▶N/A	13	Yes	
14	The books are in care of ▶Gary Depolo Located at ▶3685 Mt Diablo Blvd 351 Lafayette CA Telephone no ▶(925) 284-4427 ZIP+4 ▶94549			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 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 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 ▶	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	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 2015? <input type="checkbox"/>	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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). <input type="checkbox"/>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) <input type="checkbox"/>	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 2015?	4b		No

Part VII-B

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

5a

During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes

☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes

☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes

☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

☐ Yes

☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes

☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

No

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

c

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

☐ Yes

☒ No

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

6a

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

☐ Yes

☒ No

b

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

6b

No

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

7a

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

☐ Yes

☒ No

b

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

7b

No

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

2

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

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) 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 THE FOUNDATION HAS ONE CHARITABLE ACTIVITY (SEE EXPLANATION IN PART XVI-B)	0
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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

Total. Add lines 1 through 3

Part X

Minimum Investment Return

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	27,285,461
b	Average of monthly cash balances.	1b	544,612
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	27,830,073
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	27,830,073
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	417,451
5	Net value of noncharitable-use assets.Subtract line 4 from line 3 Enter here and on Part V, line 4	5	27,412,622
6	Minimum investment return.Enter 5% of line 5.	6	1,370,631

Part XI

Distributable Amount

(see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	1,370,631
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	32,861
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	32,861
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,337,770
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,337,770
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amountas adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,337,770

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	1,541,194
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions.Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,541,194
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions.Subtract line 5 from line 4.	6	1,541,194

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				1,337,770
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.	281,132			
b From 2011.	216,546			
c From 2012.	223,857			
d From 2013.	166,329			
e From 2014.	167,990			
f Total of lines 3a through e.	1,055,854			
4 Qualifying distributions for 2015 from Part XII, line 4				
a Applied to 2014, 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 2015 distributable amount.				1,337,770
e Remaining amount distributed out of corpus	203,424			
5 Excess distributions carryover applied to 2015 (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	1,259,278			
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 2014 Subtract line 4a from line 2a Taxable amount—see instructions.				
f Undistributed income for 2016 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 2010 not applied on line 5 or line 7 (see instructions).	281,132			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	978,146			
10 Analysis of line 9				
a Excess from 2011.	216,546			
b Excess from 2012.	223,857			
c Excess from 2013.	166,329			
d Excess from 2014.	167,990			
e Excess from 2015.	203,424			

Part XIV

b Check box to indicate whether the organization is a private operating foundation described in section 170(c)(2)(B)(i) or 170(c)(2)(B)(ii): ☐ 170(c)(2)(B)(i) or ☐ 170(c)(2)(B)(ii)

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

1 Information Regarding Foundation Managers:

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

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

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

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

- c Any submission deadlines
No deadline date required

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

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

Part XV

Supplementary Information(continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,409,000
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments					365
4	Dividends and interest from securities. . .					565,572
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory					1,076,177
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory . .					
11	Other revenue a <u>Civil action proceeds</u>					6,169
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e). .					1,648,283
13	Total. Add line 12, columns (b), (d), and (e).					1,648,283

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

[illegible]

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
Vanguard Group 2015 transfers	P	2014-06-20	2015-12-31
Vanguard Group 2015 STCG Dividends	P	2015-06-20	2015-12-31
Vanguard Group 2015 LTCG Dividends	P	2014-06-20	2015-12-31
American Fund 2015 transfers	P	2014-06-30	2015-12-31
American Fund 2015 LTCG Dividends	P	2014-06-30	2015-12-31
300 shrs Air Prod & Chemical	D	2015-05-11	2015-05-15
1025 shrs BP PLC Spon ADR	D	2015-05-11	2015-05-15
279 shrs Walt Disney co	D	2015-05-11	2015-05-15
439 shrs JP Morgan Chase & Co	D	2015-05-11	2015-05-15
350 shrs McDonalds Corp	D	2015-05-11	2015-05-15

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
5,076,836		4,305,257	771,579
14,732			14,732
351,160			351,160
251,024		328,987	-77,963
17,370			17,370
43,455		44,136	-681
43,710		43,850	-140
30,496		30,499	-3
28,699		28,693	6
34,350		34,219	131

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			771,579
			14,732
			351,160
			-77,963
			17,370
			-681
			-140
			-3
			6
			131

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
720 shrs Prudential Financial	D	2015-05-11	2015-05-15
41 shrs Transocean Ltd	D	2015-05-11	2015-05-15

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
62,125		62,176	-51
833		796	37

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			-51
			37

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
LARRY R LANGDON	PRESIDENT 1 00	0		
137 ASH LANE PORTOLA VALLEY, CA 94028				
BARBARA B CORNEILLE	Secretary 3 00	0		
112 LARK COURT ALAMO, CA 94507				
PATRICIA B CONKLIN	Vice President 4 00	0		
2361 BAY VIEW AVENUE CARMEL, CA 93921				
GARY L DEPOLO	Treasurer 3 00	0		
37 CHARLES HILL CIRCLE ORINDA, CA 94563				
JAMI S KANE	Director 2 00	0		
314 Las Quebradas Lane Alamo, CA 94507				
JOHN D ASHER	DIRECTOR 3 00	0		
3175 Walnut Blvd Walnut Creek, CA 94596				
JAYNE S MORDELL	Director 1 00	0		
40 Palmer Lane Portola Valley, CA 94028				
ANNETTE S ROBISON	Director 2 00	0		
3154 Lucas Drive Lafayette, CA 94549				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Bay Area Rescue Mission 2114 Macdonald Ave Richmond, CA 94802	Charitable	501(c)3	General Support	20,000
The Bay Area Urban Network 745 - 105th Ave Oakland, CA 94603	Charitable	501(c)3	General Support	139,500
Campus Crusade for Christ 1922 Grant St Apt 5 Berkeley, CA 94703	Charitable	501(c)3	General support	15,500
City Team Ministries PO Box 23833 Oakland, CA 94623	Charitable	501(c)3	General Support	45,000
Faith Network of the East Bay Inc 2633 Telegraph Ave 409 Oakland, CA 94612	Charitable	501(c)3	General support	35,000
Fuller Theological Seminary 135 North Oakland Ave Pasadena, CA 91182	Charitable	501(c)3	Various Programs	161,000
Harbor House Ministries Inc 1811 - 11th Ave Oakland, CA 94606	Charitable	501(c)3	General Support	30,000
Hawaiian Islands Ministries PO Box 777 Honolulu, HI 96808	Charitable	501(c)3	General support	35,000
InterVarsity Christian Fellowship 32802 Matthew Dr Dana Point, CA 92629	Charitable	501(c)3	Multiple Ministries	40,000
Joni & Friends - SF Bay Area 3553 Castro Valley Blvd Castro Valley, CA 94546	Charitable	501(c)3	Various programs	40,000
The Leadership Connection 1717 N California Blvd Ste 3D Walnut Creek, CA 94596	Charitable	501(c)3	General Support	50,000
New College Adv Christian Studies 2029 Durant Ave Berkeley, CA 94704	Charitable	501(c)3	General support	7,500
Prison Fellowship Ministries 44180 Riverside Pkwy Lansdowne, VA 20176	Charitable	501(c)3	Angel Tree program	25,000
School of Urban Missions PO Box 14145 Oakland, CA 94614	Charitable	501(c)3	Various programs	150,000
Young Life of Berkeley 2407 Dana Street Berkeley, CA 94704	Charitable	501(c)3	General support	20,000
Total			3a	1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Young Life - Diablo Valley 2363 Boulevard Circle Ste 102 Walnut Creek, CA 94595	Charitable	501(c)3	General Support	50,000
Ariel Outreach Mission PO Box 5035 Oakland, CA 94605	Charitable	501(c)3	General support	8,100
Boy Scouts of America 1001 Davis St San Leandro, CA 94577	Charitable	501(c)3	Camperships	4,000
Camps in Common PO Box 11061 Oakland, CA 94611	Charitable	501(c)3	Camperships	4,000
The Foundation Center 312 Sutter St Ste 606 San Francisco, CA 94108	Charitable	501(c)3	General Support	1,000
Girl Scouts of No California 7700 Edgewater Dr Ste 340 Oakland, CA 94621	Charitable	501(c)3	Camperships	2,000
Interfaith Council of CC County 1543 Sunnyvale Ave Walnut Creek, CA 94597	Charitable	501(c)3	Winter Nights Program	6,000
Kidpower Teenpower Fullpower PO Box 2163 Castro Valley, CA 94546	Charitable	501(c)3	General Support	1,500
Loaves & Fishes of Contra Costa 510 Garcia Ave Pittsburg, CA 94565	Charitable	501(c)3	General Support	5,000
Monument Crisis Center 2350 Monument Blvd Ste B Concord, CA 94520	Charitable	501(c)3	General support	4,000
Regional Parks Foundation PO Box 21074 Oakland, CA 94620	Charitable	501(c)3	Camperships	5,500
St Marys College PO Box 4300 Moraga, CA 94575	Charitable	501(c)3	Vern Oswald Scholarship	3,500
Samaritan Neighborhood Center 534 - 22nd St Oakland, CA 94612	Charitable	501(c)3	General support	5,000
Todays Youth Matter 461 Valley Way Milpitas, CA 95035	Charitable	501(c)3	Various programs	10,000
Trips for Kids Marin 138 Sunnyside Mill Valley, CA 94941	Charitable	501(c)3	General Support	4,500
Total				1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
All Saints Episcopal Church PO Box 1296 Carmel,CA 93921	Charitable	501(c)3	General Support	4,000
Bayshore Christian Ministries 1001 Beech St East Palo Alto,CA 94303	Charitable	501(c)3	General Support	2,000
Character Choice Inc 1545 Tanaka Dr Erie,CO 80516	Charitable	501(c)3	General Support	2,000
Community Hospital Foundation 1000 Munras Ave Ste 200 Monterey,CA 94940	Charitable	501(c)3	General Support	1,000
The Hoover Institution 326 Galvez St Stanford,CA 94305	Charitable	501(c)3	General Support	2,000
Junior League of Monterey County 391 Decatur St Monterey,CA 93940	Charitable	501(c)3	General Support	500
Monterey County Symphony Assoc PO Box 3965 Carmel,CA 93921	Charitable	501(c)3	General Support	2,000
Punahou School 1601 Puahou St Honolulu,HI 96822	Charitable	501(c)3	General Support	500
San Francisco Symphony Davies Symphony Hall San Francisco,CA 94102	Charitable	501(c)3	General support	1,000
St Stephens Episcopal Church 66 St Stephens Dr Orinda,CA 94563	Charitable	501(c)3	General Support	9,000
Stanford University Medical Ctr 326 Galvez St Stanford,CA 94305	Charitable	501(c)3	Various Programs	8,000
Walnut Creek Presbyterian Church 1801 Lacassie Ave Walnut Creek,CA 94596	Charitable	501(c)3	General support	17,850
WellSpring PO Box 7384 Menlo Park,CA 94026	Charitable	501(c)3	General support	7,000
Wounded Warrior Project WWP 7020 ACSkinner Pkwy Ste 100 Jacksonville,FL 32256	Charitable	501(c)3	General support	300
Carmel-by-the-Sea Public Library Found PO Box 2042 Carmel,CA 93921	Charitable	501(c)3	General Support	1,000
Total 3a				1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Carmel Foundation PO Box 1050 Carmel, CA 93921	Charitable	501(c)3	General Support	1,000
Contra Costa Kops for Kids 1430 Willow Pass Rd 130 Concord, CA 94520	Charitable	501(c)3	General support	3,000
Court Appointed Spec Repres Program 2020 North Broadway Ste 204 Walnut Creek, CA 94596	Charitable	501(c)3	General Support	5,000
Hispanic Ministry Center Inc 2321 East 4th St Ste C607 Santa Ana, CA 92705	Charitable	501(c)3	UYWI - RELOAD	7,500
Oakland Youth Chorus 2501 Harrison St Oakland, CA 94612	Charitable	501(c)3	General support	2,000
PTA CA Congress 561 Merriewood Dr Lafayette, CA 94549	Charitable	501(c)3	General Support	1,000
San Francisco Ballet Assoc 455 Franklin St San Francisco, CA 94102	Charitable	501(c)3	General Support	1,000
Stanford Univ - Dept of Athletics 326 Galvez Street Stanford, CA 94305	Charitable	501(c)3	Various programs	20,500
Wardrobe for Oportunity 570 14th St Ste 5 Oakland, CA 94512	Charitable	501(c)3	General Support	2,500
Child Abuse Prevention Council 1410 Danzig Plaza Ste 110 Concord, CA 94520	Charitable	501(c)3	General Support	4,000
John Ernest Foundation PO Box 60225 Palo Alto, CA 94306	Charitable	501(c)3	General Support	500
League of Volunteers of Newark 36120 Ruschin Drive Newark, CA 94560	Charitable	501(c)3	Summer Park Program	3,000
Loved Twice 4245 College Ave Ste 803 Oakland, CA 94618	Charitable	501(c)3	General Support	6,000
SOAR for Youth PO Box 1291 Berkeley, CA 94701	Charitable	501(c)3	General Support	6,000
Down Syndrome Connection 101-J Town Country Dr Danville, CA 94526	Charitable	501(c)3	General support	2,000
Total			3a	1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Game Theory Academy 337 - 17th St 101 Oakland, CA 94612	Charitable	501(c)3	General support	3,000
Living Dream Arts 4198 - 2nd Ave 303 San Francisco, CA 94118	Charitable	501(c)3	General support	2,500
Monterey Bay Aquarium 886 Cannery Row Monterey, CA 93940	Charitable	501(c)3	General support	500
Navy Seals Warrior Fund Inc 1619 D Street Virginia Beach, VA 23459	Charitable	501(c)3	General support	500
Project Avary 384 Bel Marin Keys Blvd Ste G Novato, CA 94949	Charitable	501(c)3	Various programs	4,000
Q Place PO Box 1581 Wheaton, IL 60187	Charitable	501(c)3	Various programs	8,000
All Saints Episcopal Day School 8060 Carmel Valley Road Carmel, CA 93923	Charitable	501(c)3	General support	2,000
Alliance Defending Freedom 15100 North 90th St Scottsdale, AZ 85260	Charitable	501(c)3	General support	2,000
Chabot Space & Science Center 10000 Skyline Blvd Oakland, CA 94619	Charitable	501(c)3	Teacher Training	8,220
East Bay Zoological Society 9777 Golf Links Rd Oakland, CA 94605	Charitable	501(c)3	Camperships	3,000
Fellowship of Christian Athletes 8701 Leeds Road Kansas City, MO 64129	Charitable	501(c)3	Various programs	13,000
Lafayette Partners in Education PO Box 923 Lafayette, CA 94549	Charitable	501(c)3	General support	5,000
No California Urban Development Corp 1836 Bay Road East Palo Alto, CA 94303	Charitable	501(c)3	General support	5,000
Oakland Elizabeth House 6423 Colby St Oakland, CA 94618	Charitable	501(c)3	General support	5,000
Oakland Soc for Prevention 8323 Baldwin St Oakland, CA 94621	Charitable	501(c)3	General support	300
Total				1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Stand For Families Free of Violence 1410 Danzig Plaza Ste 200 Concord, CA 94520	Charitable	501(c)3	General support	7,000
Tony LaRussas Animal Rescue Foundation PO Box 30215 Walnut Creek, CA 94598	Charitable	501(c)3	General support	500
United Service Organization Inc 211 Wilson Blvd Ste 1200 Arlington, VA 22201	Charitable	501(c)3	General support	250
University of the Pacific 3601 Pacific Ave Stockton, CA 95211	Charitable	501(c)3	Athletic Dept	10,000
Variety Club Blind Babies Found 1814 Franklin Ave 11th Floor Oakland, CA 94612	Charitable	501(c)3	General support	1,500
Acalanes Booster Club 1200 Pleasant Hill Road Lafayette, CA 94549	Charitable	501(c)3	General support	500
Arm of Care Inc 1862 Shuey Avenue Walnut Creek, CA 94596	Charitable	501(c)3	General support	5,000
Assoc Students of Univ of Calif 112 Hearst Gym 4520 Berkeley, CA 94720	Charitable	501(c)3	Egg Hunt & Learn	1,000
Blue Mountain Coalition for Youth and PO Box 41 West Point, CA 95255	Charitable	501(c)3	General support	1,000
Bread Project 1555 Park Avenue Unit B Emeryville, CA 94608	Charitable	501(c)3	General support	6,000
City Team Ministries San Jose 2304 Zanker Road San Jose, CA 95131	Charitable	501(c)3	General support	2,000
Diocese of Oakland 2121 Harrison Street Suite 100 Oakland, CA 94612	Charitable	501(c)3	RACE	8,000
Ripe for Harvest World Outreach 2824 N Power Road 113282 Mesa, AZ 85215	Charitable	501(c)3	General support	10,000
Family Emergency Shelter Coalition 21455 Birch Street 5 Hayward, CA 94541	Charitable	501(c)3	General support	5,000
John F Kennedy University 100 Ellinwood Way Pleasant Hill, CA 94523	Charitable	501(c)3	Camperships	3,000
Total				1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
My New Red Shoes 330 Twin Dolphin Drive Suite 135 Redwood City, CA 94065	Charitable	501(c)3	General support	4,000
Oakland Leaf Foundation 7700 Edgewater Drive Suite 818 Oakland, CA 94621	Charitable	501(c)3	General support	3,000
Opportunity Camp 2845 Verne Roberts Circle Antioch, CA 94509	Charitable	501(c)3	Camperships	4,500
Resource Exchange Intl 5446 N Academy Blvd Ste 202 Colorado Springs, CO 80918	Charitable	501(c)3	General Support	1,000
The Rock Church 4950 Vista Blvd Sparks, NV 89436	Charitable	501(c)3	General support	1,000
The Salvation Army - Alameda County 130 Doolittle Drive Suite12 San Leandro, CA 94577	Charitable	501(c)3	Christmas food	6,000
The Salvation Army - San Francisco 832 Folsom Street 600 San Francisco, CA 94107	Charitable	501(c)3	General support	2,000
San Francisco Opera Assoc 301 Van Ness Avenue San Francisco, CA 94102	Charitable	501(c)3	General support	1,000
Stagebridge 2501 Harrison Street Oakland, CA 94612	Charitable	501(c)3	General support	2,000
Super Stars Literacy Inc 675 Hegenberger Rd Suite 250 Oakland, CA 94621	Charitable	501(c)3	General support	4,000
Treasure Island Sailing Ctr Fund 698 California Avenue Bldg 112 San Francisco, CA 94130	Charitable	501(c)3	Camperships	3,500
Trinity Center Walnut Creek 1924 Trinity Avenue Walnut Creek, CA 94596	Charitable	501(c)3	General support	10,000
Wuqu Kawoq SA PO 91 Bethel, VT 05032	Charitable	501(c)3	General support	500
Ann Martin Center 1375 55th Street Emeryville, CA 94608	Charitable	501(c)3	Learning Prog	3,000
California Assoc of Student Council 1212 Preservation Park Way Oakland, CA 94612	Charitable	501(c)3	Leadership School	2,500
Total				1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Cazadero Performing Arts Camp PO Box 7908 Berkeley, CA 94707	Charitable	501(c)3	Camperships	3,000
CC Interfaith Transitional Housing 1815 Arnold Drive Martinez, CA 94553	Charitable	501(c)3	General support	5,000
Community Alliance for Learning 1191 Solano Ave Albany, CA 94706	Charitable	501(c)3	Writer/Coach	2,500
Creative Growth Center 355 24th Street Oakland, CA 94612	Charitable	501(c)3	Saturday Art Program	2,000
Crisis Support Services of Alameda PO Box 3120 Oakland, CA 94609	Charitable	501(c)3	General support	3,000
Hayward Youth Academy 1065 A Street 204 Hayward, CA 94544	Charitable	501(c)3	General support	500
Homeward Bound Golden Retriever 7495 Natomas Road Elverta, CA 95626	Charitable	501(c)3	General support	500
John Muir Health Foundation 1400 Treat Blvd Ste C607 Walnut Creek, CA 94597	Charitable	501(c)3	Caring Hands	2,500
Love-A-Child Missions 2279 Willow Pass Road Bay Point, CA 94565	Charitable	501(c)3	General support	5,000
The Mentoring Center 672 - 13th St Ste 200 Oakland, CA 94612	Charitable	501(c)3	Transformative	2,000
Natl Council of US Society of St 2210 Gladstone Drive Pittsburgh, CA 94565	Charitable	501(c)3	Immaculate Hrt of	10,000
New Christ Memorial Church 13333 Vaughn Street San Fernando, CA 91340	Charitable	501(c)3	General support	1,000
Oakland Digital Arts & Literacy Ctr 1224 Harrison Street Oakland, CA 94612	Charitable	501(c)3	Inspire Oakland 2	5,000
Placer County Sheriffs Dept Search & Res 2929 Richardson Drive Auburn, CA 95603	Charitable	501(c)3	General support	300
Reading Partners 180 Grand Avenue 800 Oakland, CA 94612	Charitable	501(c)3	General support	5,000
Total				1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
San Leandro Boys & Girls Club 401 Marina Blvd San Leandro, CA 94577	Charitable	501(c)3	Positive Life Skill	5,000
San Ramon Valley Educ Fund 100 Wilson Road Alamo, CA 94507	Charitable	501(c)3	Various programs	695
San Ramon Valley HS Academic 501 Danville Blvd Danville,CA 94526	Charitable	501(c)3	General support	5,400
San Ramon Valley HS Athletic 501 Danville Blvd Danville,CA 94526	Charitable	501(c)3	General Support	600
Shelter Inc of Contra Costa County 1815 Arnold Drive Martinez,CA 94553	Charitable	501(c)3	Various programs	6,250
Sierra Service Project PO Box 992 Carmichael,CA 95609	Charitable	501(c)3	Camperships	2,000
Teen Esteem PO Box 966 Danville,CA 94526	Charitable	501(c)3	General support	8,700
Tides Cener The Presidio 1014 Tomey Avenue San Francisco,CA 94129	Charitable	501(c)3	Boostl West Oakland	4,000
WCC Salesian Boys & Girls Club PO Box 6120 San Pablo,CA 94806	Charitable	501(c)3	General support	2,500
Womens Cancer Resource Center 5741 Telegraph Avenue Oakland,CA 94609	Charitable	501(c)3	Swim a Mile	500
100 Black Men of the Bay Area Inc 1638 12TH St Oakland,CA 94607	Charitable	501(c)3	East Oakland Training	1,700
All Orinda Reunion PO Box 446 Orinda,CA 94563	Charitable	501(c)3	General Support	350
Assistance League of Diablo Valley 2711 Buena Vista Ave Walnut Creek,CA 94597	Charitable	501(c)3	General Support	3,500
Berkeley Food & Housing Project 1901 Fairview St Berkeley,CA 94703	Charitable	501(c)3	Various Programs	8,000
Boys & Girls Clubs of Oakland 3300 High Street Oakland,CA 94619	Charitable	501(c)3	Camperships	4,680
Total				1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Boys & Girls Clubs of the Diablo 1301 Alhambra Ave Martinez, CA 94553	Charitable	501(c)3	Smart Girls Pro	4,000
Camp Phoenix Inc 39931 Parada St B Newark, CA 94560	Charitable	501(c)3	Camperships	4,500
Campus Crusade for Christ - FL 100 Lake Hart Dr Orlando, FL 32832	Charitable	501(c)3	General Support	500
Civicorps Schools 101 Myrtle St Oakland, CA 94607	Charitable	501(c)3	Food for Thought	2,500
Clausen House Inc 88 Vernon St Oakland, CA 94610	Charitable	501(c)3	General Support	3,000
Comm Options For Families & Youth 3478 Buskirk Ave Pleasant Hill, CA 94523	Charitable	501(c)3	General Support	10,000
Contra Costa Christian High School 2721 Larkey Ln Walnut Creek, CA 94597	Charitable	501(c)3	General Support	1,200
Cornestone Comm Dev Corp 1395 Bancroft Ave San Leandro, CA 94577	Charitable	501(c)3	General Support	2,500
The Crayon Initiative 540 Glasgow Circle Danville, CA 94526	Charitable	501(c)3	General Support	2,000
East Oakland Youth Development 8200 International Blvd Oakland, CA 94621	Charitable	501(c)3	General Support	1,000
Girl Scouts of the US 420 5th Ave New York, NY 10018	Charitable	501(c)3	CA Troop #3224	1,000
Harvest Partners Inc 15055 W 116th St Olathe, KS 66062	Charitable	501(c)3	General Support	1,000
Juvenile Diabetes Research Fund 26 Broadway 14th Floor New York, NY 10004	Charitable	501(c)3	General Support	2,305
Lafayette Water Polo Foundation 1015 Hampton Rd Lafayette, CA 94549	Charitable	501(c)3	General Support	1,000
The Leukemia & Lymphomia Society 675 N 1st St 1100 San Jose, CA 95112	Charitable	501(c)3	General Support	500
Total				1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Meals on Wheels Senior Outreach Services 1300 Civic Drive Walnut Creek, CA 94596	Charitable	501(c)3	General Support	1,300
Mt Calvary Monastery 505 E Los Olivos St Santa Barbara, CA 93105	Charitable	501(c)3	General Support	500
Next Step Learning Center 2222 Curtis St Oakland, CA 94607	Charitable	501(c)3	HS Equivalency	5,000
Northcreek Church 2303 Ygnacio Valley Rd Walnut Creek, CA 94598	Charitable	501(c)3	Wells Family Mission	1,000
Opportunity Junction Inc 3102 Delta Fair Blvd Antioch, CA 94509	Charitable	501(c)3	General Support	2,000
Rubys Place Inc 1180 B St Hayward, CA 94541	Charitable	501(c)3	General Support	2,500
Safe Alternatives to Violent Environment 1900 Mowry Ave 201 Fremont, CA 94538	Charitable	501(c)3	General Support	2,000
Safe Families Northern California 1251 Monument Blvd 220 Concord, CA 94520	Charitable	501(c)3	General Support	5,000
Saint Elizabeth Elementary School 1516 33rd Avd Oakland, CA 94601	Charitable	501(c)3	Special Needs	3,000
Salesian College Preparatory 2851 Salesian Ave Richmond, CA 94804	Charitable	501(c)3	Scholarships	4,000
Soccer Without Borders PO Box 3443 Oakland, CA 94609	Charitable	501(c)3	General Support	1,000
Stanford University - The Stanford Fund PO Box 20466 Stanford, CA 94309	Charitable	501(c)3	Mem of Patrick S	1,000
St Edward School 5788 Thornton Ave Newark, CA 94560	Charitable	501(c)3	Special Needs Program	2,500
St Vincent de Paul Society 675 23rd St Oakland, CA 94612	Charitable	501(c)3	Vinventian Life	4,000
Telegraph Hill Neighborhood Cent 660 Lombard St San Francisco, CA 94133	Charitable	501(c)3	General Support	5,000
Total 3a				1,409,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
The Volunteer Center of the East Bay 700 Ygnacio Valley Rd Walnut Creek, CA 94596	Charitable	501(c)3	General Support	1,500
University of Colorado 1600 Broadway Denver, CO 80202	Charitable	501(c)3	General Support	500
Vietnamese American Community 655 International Blvd Oakland, CA 94606	Charitable	501(c)3	General Support	2,000
Village Community Resource Ctr 633 Village Dr Brentwood, CA 94513	Charitable	501(c)3	After School Programs	2,000
YEAH 1744 University Ave Berkeley, CA 94703	Charitable	501(c)3	General Support	2,500
Stanford University 450 Serra Mall Stanford, CA 94305	Charitable	501(c)3	General Support	1,000
Total			3a	1,409,000

TY 2015 Accounting Fees Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Harrison Accounting Group	12,435	622	0	11,813

TY 2015 Investments - Other Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 15000324

Software Version: 2015v2.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Vanguard Group	FMV	24,211,019	24,211,019
American Funds	FMV	1,929,280	1,929,280

**TY 2015 Land, Etc.
Schedule**

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 15000324

Software Version: 2015v2.0

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

TY 2015 Other Decreases Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 15000324

Software Version: 2015v2.0

Description	Amount
Change in FMV of investments	2,000,579

TY 2015 Other Expenses Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 15000324**Software Version:** 2015v2.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank charges	12	1		11
Dues & subscriptions	620	31		589
Insurance	5,404	270		5,134
Office supplies	1,741	87		1,654
Penalties	156			156
Repairs & maintenance	3,411	171		3,240
Telephone	3,018	151		2,867

TY 2015 Other Income Schedule

Name: LOWELL BERRY FOUNDATION

EIN: 94-6108391

Software ID: 15000324

Software Version: 2015v2.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Civil action proceeds	6,169	6,169	

TY 2015 Other Liabilities Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 15000324**Software Version:** 2015v2.0

Description	Beginning of Year - Book Value	End of Year - Book Value
Payroll tax payable	2,711	2,620
Federal excise tax payable		9,017

TY 2015 Taxes Schedule**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 15000324**Software Version:** 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise tax on investment	32,861			32,861
Foreign taxes on dividend income	2,343	117		2,226
Payroll taxes	2,992	150		2,842
Personal property taxes	116	6		110
RRF-1 Form	150	8		142
State Form 199 fee	10	1		9

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.</div>	<div>OMB No 1545-0047</div>
		<div>2015</div>

<div>Name of the organization</div> <div>LOWELL BERRY FOUNDATION</div>	<div>Employer identification number</div> <div>94-6108391</div>
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Organization type (check one)

<div>Filers of:</div> <div>Form 990 or 990-EZ</div> <div>Form 990-PF</div>	<div>Section:</div> <div><div><input type="checkbox"/> 501(c)() (enter number) organization</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div><div><input type="checkbox"/> 527 political organization</div><div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div><div><input type="checkbox"/> 501(c)(3) taxable private foundation</div></div>
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Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

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

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

Name of organization LOWELL BERRY FOUNDATION	Employer identification number 94-6108391
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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			Person <input type="checkbox"/>
	Patricia Berry Conklin 231 Bay View Avenue	\$ 244,369	Payroll <input type="checkbox"/>
	Carmel, CA 939239117		Noncash <input checked="" type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person <input type="checkbox"/>
		\$	Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person <input type="checkbox"/>
		\$	Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person <input type="checkbox"/>
		\$	Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person <input type="checkbox"/>
		\$	Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person <input type="checkbox"/>
		\$	Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person <input type="checkbox"/>
		\$	Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>

Name of organization LOWELL BERRY FOUNDATION	Employer identification number 94-6108391
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Part II

Noncash Property

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	Various securities	\$ 244,369	2015-05-11
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization LOWELL BERRY FOUNDATION	Employer identification number 94-6108391
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Part III

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

Use duplicate copies of Part III if additional space is needed

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