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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](http://www.irs.gov/form990pf).

2016

Open to Public  
Inspection

For calendar year 2016, or tax year beginning 01-01-2016, and ending 12-31-2016

Name of foundation LOWELL BERRY FOUNDATION		A Employer identification number 94-6108391	
Number and street (or P O box number if mail is not delivered to street address) 3685 Mt Diablo Blvd 351		B Telephone number (see instructions) (925) 284-4427	
City or town, state or province, country, and ZIP or foreign postal code Lafayette, CA 94549		C If exemption application is pending, check here ► <input type="checkbox"/>	
<b>G</b> Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D</b> 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ► <input type="checkbox"/>	
<b>H</b> 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		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here ► <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 27,286,350	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis)</i>	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► <input type="checkbox"/>	

<b>Part I Analysis of Revenue and Expenses</b> <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	660	660	660	
4	Dividends and interest from securities	596,855	596,855	596,855	
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	1,708,609			
b	Gross sales price for all assets on line 6a	7,323,766			
7	Capital gain net income (from Part IV, line 2)		1,708,609		
8	Net short-term capital gain			5,953	
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	<b>Total.</b> Add lines 1 through 11	2,306,124	2,306,124	603,468	
13	Compensation of officers, directors, trustees, etc				
14	Other employee salaries and wages	42,097	2,105		39,992
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)	14,215	711		13,504
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see instructions)	29,339	2,935		26,404
19	Depreciation (attach schedule) and depletion				
20	Occupancy	36,947	1,847		35,100
21	Travel, conferences, and meetings	122	6		116
22	Printing and publications				
23	Other expenses (attach schedule)	41,231	2,061		39,170
24	<b>Total operating and administrative expenses.</b>				
	Add lines 13 through 23	163,951	9,665		154,286
25	Contributions, gifts, grants paid	1,440,000			1,440,000
26	<b>Total expenses and disbursements.</b> Add lines 24 and 25	1,603,951	9,665		1,594,286
27	Subtract line 26 from line 12				
a	<b>Excess of revenue over expenses and disbursements</b>	702,173			
b	<b>Net investment income</b> (if negative, enter -0-)		2,296,459		
c	<b>Adjusted net income</b> (if negative, enter -0-)			603,468	

	<b>Part II Balance Sheets</b>	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
	1 Cash—non-interest-bearing . . . . .		50	50	50
	2 Savings and temporary cash investments . . . . .		387,991	54,780	54,780
	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 . . . . .			13,030	13,030
	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) . . . . .		26,140,299	27,218,490	27,218,490
	14 Land, buildings, and equipment basis ►	64,316			
	Less accumulated depreciation (attach schedule) ►	64,316			
	15 Other assets (describe ►) . . . . .				
	16 <b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)		26,528,340	27,286,350	27,286,350
	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 ►) . . . . .	11,637	3,783		
	23 <b>Total liabilities</b> (add lines 17 through 22) . . . . .	11,637	3,783		
	<b>Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/></b> <b>and complete lines 24 through 26 and lines 30 and 31.</b>				
	24 Unrestricted . . . . .		26,516,703	27,282,567	
	25 Temporarily restricted . . . . .				
	26 Permanently restricted . . . . .				
	<b>Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/></b> <b>and complete lines 27 through 31.</b>				
	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 <b>Total net assets or fund balances</b> (see instructions) . . . . .	26,516,703	27,282,567		
	31 <b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	26,528,340	27,286,350		

**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	26,516,703
2	Enter amount from Part I, line 27a . . . . .	2	702,173
3	Other increases not included in line 2 (itemize) ►	3	63,691
4	Add lines 1, 2, and 3 . . . . .	4	27,282,567
5	Decreases not included in line 2 (itemize) ►	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	27,282,567

**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.)
<b>1 a</b> Vanguard Group 2016 transfers			P	2015-06-20	2016-12-31
<b>b</b> Vanguard Group 2016 STCG Dividends			P	2016-06-20	2016-12-31
<b>c</b> Vanguard Group 2016 LTCG Dividends			P	2015-06-20	2016-12-31
<b>d</b>					
<b>e</b>					
(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)		
<b>a</b> 7,088,308		5,615,157	1,473,151		
<b>b</b> 5,953			5,953		
<b>c</b> 229,505			229,505		
<b>d</b>					
<b>e</b>					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any			
<b>a</b>					1,473,151
<b>b</b>					5,953
<b>c</b>					229,505
<b>d</b>					
<b>e</b>					
<b>2</b> 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	1,708,609	
<b>3</b> 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	5,953

**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

 Yes  No

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

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))
2015	1,541,194	27,412,622	0 05622
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
<b>2 Total</b> of line 1, column (d)			0 283991
<b>3</b> 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			0 056798
<b>4</b> Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			26,334,465
<b>5</b> Multiply line 4 by line 3			1,495,745
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			22,965
<b>7</b> Add lines 5 and 6			1,518,710
<b>8</b> Enter qualifying distributions from Part XIII, line 4			1,594,286

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 ► <input type="checkbox"/> and enter "N/A" on line 1	1	22,965
	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 ► <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	22,965
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2.	3	22,965
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .	5	22,965
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	36,000
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.	7	36,000
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	5
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	13,030
11	Enter the amount of line 10 to be <b>Credited to 2017 estimated tax</b> ►	11	
	13,030	Refunded ►	

**Part VII-A Statements Regarding Activities**

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b	Yes	No
	<i>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</i>			
c	Did the foundation file <b>Form 1120-POL</b> for this year?	1c	Yes	No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
(1)	On the foundation ► \$ _____	(2)	On foundation managers ► \$ _____	
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2	Yes	No
	<i>If "Yes," attach a detailed description of the activities</i>			
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	Yes	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	No
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?	4b	Yes	No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	Yes	No
	<i>If "Yes," attach the statement required by General Instruction T</i>			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either <ul style="list-style-type: none"> <li>By language in the governing instrument, or</li> <li>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?</li> </ul>	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	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? <i>If "No," attach explanation</i>	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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	Yes	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	Yes	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 ► [www.lowellberryfoundation.org](http://www.lowellberryfoundation.org) 13 Yes

14 The books are in care of ► Gary Depolo Telephone no ► (925) 284-4427

Located at ► 3685 Mt Diablo Blvd 351 Lafayette CA

ZIP+4 ► 94549

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here and enter the amount of tax-exempt interest received or accrued during the year. ► 15 □

16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 16 Yes No

See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes", enter the name of the foreign country ►

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

1a During the year did the foundation (either directly or indirectly)

(1) Engage in the sale or exchange, or leasing of property with a disqualified person? □ Yes  No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? □ Yes  No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? □ Yes  No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? □ Yes  No

(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? □ Yes  No

(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). □ Yes  No

b If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here. ► □ 1b No

c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? 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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years ► 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_ □ Yes  No

b Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions) 2b No

c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ► 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? □ Yes  No

b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016). 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 2016? 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 <b>(1)</b> Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? . . . . . <b>(2)</b> Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? . . . . . <b>(3)</b> Provide a grant to an individual for travel, study, or other similar purposes? . . . . . <b>(4)</b> Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). . . . . <b>(5)</b> Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No						
b	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)? . . . . . Organizations relying on a current notice regarding disaster assistance check here. . . . . ► <input type="checkbox"/>							5b
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? . . . . . <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No						
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No						
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . . <i>If "Yes" to 6b, file Form 8870</i>							6b
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No						
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .							7b

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

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

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "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	26,345,310
b	Average of monthly cash balances. . . . .	1b	390,187
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	<b>Total</b> (add lines 1a, b, and c). . . . .	1d	26,735,497
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	26,735,497
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	401,032
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	26,334,465
6	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	6	1,316,723

**Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign**Part XI** organizations check here ►  and do not complete this part )

1	Minimum investment return from Part X, line 6. . . . .	1	1,316,723
2a	Tax on investment income for 2016 from Part VI, line 5. . . . .	2a	22,965
b	Income tax for 2016 (This does not include the tax from Part VI). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	22,965
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	1,293,758
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	1,293,758
6	Deduction from distributable amount (see instructions). . . . .	6	
7	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	1,293,758

**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	1,594,286
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	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,594,286
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	22,965
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	6	1,571,321
<b>Note:</b> 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 2015	(c) 2015	(d) 2016
<b>1</b> Distributable amount for 2016 from Part XI, line 7				1,293,758
<b>2</b> Undistributed income, if any, as of the end of 2016				
<b>a</b> Enter amount for 2015 only. . . . .				
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2016				
<b>a</b> From 2011. . . . . 216,546				
<b>b</b> From 2012. . . . . 223,857				
<b>c</b> From 2013. . . . . 166,329				
<b>d</b> From 2014. . . . . 167,990				
<b>e</b> From 2015. . . . . 203,424				
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	978,146			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4 ► \$ 1,594,286				
<b>a</b> Applied to 2015, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2016 distributable amount. . . . .				1,293,758
<b>e</b> Remaining amount distributed out of corpus	300,528			
<b>5</b> Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> <b>Enter the net total of each column as indicated below:</b>	1,278,674			
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5				
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b. . . . .				
<b>c</b> 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. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .				
<b>e</b> Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
<b>f</b> Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017. . . . .				0
<b>7</b> 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) . . . . .				
<b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) . . . . .	216,546			
<b>9</b> <b>Excess distributions carryover to 2017.</b> Subtract lines 7 and 8 from line 6a. . . . .	1,062,128			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2012. . . . . 223,857				
<b>b</b> Excess from 2013. . . . . 166,329				
<b>c</b> Excess from 2014. . . . . 167,990				
<b>d</b> Excess from 2015. . . . . 203,424				
<b>e</b> Excess from 2016. . . . . 300,528				

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9)

1a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. ►			
b	Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)			
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.			
b	85% of line 2a.			
c	Qualifying distributions from Part XII, line 4 for each year listed.			
d	Amounts included in line 2c not used directly for active conduct of exempt activities.			
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.			
3	Complete 3a, b, or c for the alternative test relied upon			
a	"Assets" alternative test—enter			
(1)	Value of all assets.			
(2)	Value of assets qualifying under section 4942(j)(3)(B)(i).			
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.			
c	"Support" alternative test—enter			
(1)	Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).			
(2)	Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).			
(3)	Largest amount of support from an exempt organization.			
(4)	Gross investment income.			

**Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)****1 Information Regarding Foundation Managers:**

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

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed  
The Lowell Berry Foundation  
3685 Mt Diablo Blvd Ste 351  
Lafayette, CA 94549

b The form in which applications should be submitted and information and materials they should include  
There is no standard request form required by the foundation. All applications for grant requests are submitted on applicant's form or letterhead

c Any submission deadlines  
No deadline date required

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors  
Only restriction is that the applicant must be located in the State of California counties of Alameda or Contra Costa

## **Part XV    Supplementary Information (continued)**

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

Part XVI-A Analysis of Income-Producing Activities

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	
<b>1 Program service revenue</b>					
a					
b					
c					
d					
e					
f					
<b>g Fees and contracts from government agencies</b>					
<b>2 Membership dues and assessments.</b>					
<b>3 Interest on savings and temporary cash investments</b>					660
<b>4 Dividends and interest from securities.</b>					596,855
<b>5 Net rental income or (loss) from real estate</b>					
a Debt-financed property.					
b Not debt-financed property.					
<b>6 Net rental income or (loss) from personal property</b>					
<b>7 Other investment income.</b>					
<b>8 Gain or (loss) from sales of assets other than inventory</b>					1,708,609
<b>9 Net income or (loss) from special events</b>					
<b>10 Gross profit or (loss) from sales of inventory</b>					
<b>11 Other revenue a</b>					
b					
c					
d					
e					
<b>12 Subtotal Add columns (b), (d), and (e).</b>					2,306,124
<b>13 Total. Add line 12, columns (b), (d), and (e).</b>					2,306,124

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



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

<b>(a)</b> Name and address	<b>(b)</b> Title, and average hours per week devoted to position	<b>(c)</b> Compensation (If not paid, enter -0-)	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	<b>(e)</b> Expense account, other allowances
LARRY R LANGDON 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	PRESIDENT 1 00	0		
BARBARA B CORNEILLE 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	Secretary 1 00	0		
PATRICIA B CONKLIN 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	Vice President 1 00	0		
BRUCE MCINTOSH 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	Director 1 00	0		
GARY L DEPOLO 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	Treasurer 2 00	0		
JAMI S KANE 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	Director 1 00	0		
JOHN D ASHER 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	DIRECTOR 2 00	0		
JAYNE S MORDELL 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	Director 1 00	0		
ANNETTE S ROBISON 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	Director 1 00	0		
KEN PEREZ 3685 Mt Diablo Blvd Ste 351 Lafayette, CA 94549	Director 1 00	0		

## 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)				
<b>a Paid during the year</b>				
Bay Area Rescue Mission 2114 Macdonald Ave Richmond, CA 94802	Charitable	501(c)3	General Support	17,500
The Bay Area Urban Network 745 - 105th Ave Oakland, CA 94603	Charitable	501(c)3	General Support	137,750
Campus Crusade for Christ - CA 1922 Grant St Apt 5 Berkeley, CA 94703	Charitable	501(c)3	General support	15,000
City Team Ministries PO Box 23833 Oakland, CA 94623	Charitable	501(c)3	General Support	45,000
Faith Network of the East Bay Inc 2633 Telegraph Ave 409 Oakland, CA 94612	Charitable	501(c)3	General support	35,000
Fuller Theological Seminary 135 North Oakland Ave Pasadena, CA 91182	Charitable	501(c)3	Various Programs	161,500
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	36,500
Intervarsity Christian Fellowship 32802 Matthew Dr Dana Point, CA 92629	Charitable	501(c)3	Multiple Ministries	40,000
Joni & Friends - SF Bay Area 3553 Castro Valley Blvd Castro Valley, CA 94546	Charitable	501(c)3	Various programs	40,000
The Leadership Connection 1717 N California Blvd Ste 3D Walnut Creek, CA 94596	Charitable	501(c)3	General Support	50,000
New College Adv Christian Studies 2029 Durant Ave Berkeley, CA 94704	Charitable	501(c)3	General support	7,500
Prison Fellowship Ministries 44180 Riverside Pkwy Lansdowne, VA 20176	Charitable	501(c)3	Angel Tree program	25,000
School of Urban Missions PO Box 14145 Oakland, CA 94614	Charitable	501(c)3	Various programs	153,000
Young Life of Berkeley 2407 Dana Street Berkeley, CA 94704	Charitable	501(c)3	General support	22,000
<b>Total . . . . .</b>				1,440,000
<b>3a</b>				

**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)				
<b>a Paid during the year</b>				
Young Life - Diablo Valley 2363 Boulevard Circle Ste 102 Walnut Creek, CA 94595	Charitable	501(c)3	General Support	59,000
Ariel Outreach Mission PO Box 5035 Oakland, CA 94605	Charitable	501(c)3	General support	6,800
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
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	6,000
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	5,000
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	4,000
All Saints Episcopal Church PO Box 1296 Carmel, CA 93921	Charitable	501(c)3	General Support	2,000
<b>Total . . . . .</b>				1,440,000
<b>3a</b>				

## 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)				
<b>a Paid during the year</b>				
Bayshore Christian Ministries 1001 Beech St East Palo Alto, CA 94303	Charitable	501(c)3	General Support	2,500
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
Hoover Institution - Stanford University 434 Galvez Mall Stanford University Stanford, CA 94305	Charitable	501(c)3	General Support	2,500
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
San Francisco Symphony Davies Symphony Hall San Francisco, CA 94102	Charitable	501(c)3	General support	500
St Stephens Episcopal Church 66 St Stephens Dr Orinda, CA 94563	Charitable	501(c)3	General Support	6,000
Stanford University Medical Ctr 326 Galvez St Stanford, CA 94305	Charitable	501(c)3	Various Programs	4,000
Walnut Creek Presbyterian Church 1801 Lacassie Ave Walnut Creek, CA 94596	Charitable	501(c)3	General support	17,000
WellSpring PO Box 7384 Menlo Park, CA 94026	Charitable	501(c)3	General support	36,500
Carmel-by-the-Sea Public Library Found PO Box 2042 Carmel, CA 93921	Charitable	501(c)3	General Support	1,000
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	4,000
Court Appointed Spec Repres Program 2020 North Broadway Ste 204 Walnut Creek, CA 94596	Charitable	501(c)3	General Support	6,500
<b>Total . . . . .</b>				1,440,000
<b>3a</b>				

**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)				
<b>a Paid during the year</b>				
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	4,000
Stanford Univ - Dept of Athletics 326 Galvez Street Stanford, CA 94305	Charitable	501(c)3	Various programs	17,500
Wardrobe for Opportunity 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
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
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	3,000
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
<b>Total . . . . .</b>				1,440,000
<b>3a</b>				

## 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)				
<b>a Paid during the year</b>				
All Saints Episcopal Day School 8060 Carmel Valley Road Carmel, CA 93923	Charitable	501(c)3	General support	1,000
Alliance Defending Freedom 15100 North 90th St Scottsdale, AZ 85260	Charitable	501(c)3	General support	2,000
East Bay Zoological Society 9777 Golf Links Rd Oakland, CA 94605	Charitable	501(c)3	Camperships	3,000
Fellowship of Christian Athletes 8701 Leeds Road Kansas City, MO 64129	Charitable	501(c)3	Various programs	13,000
Lafayette Partners in Education PO Box 923 Lafayette, CA 94549	Charitable	501(c)3	General support	4,000
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
Stand For Families Free of Violence 1410 Danzig Plaza Ste 200 Concord, CA 94520	Charitable	501(c)3	General support	6,000
Tony LaRussas Animal Rescue Foundation PO Box 30215 Walnut Creek, CA 94598	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
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	10,800
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
<b>Total . . . . .</b>				1,440,000
<b>3a</b>				

## 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)				
<b>a Paid during the year</b>				
Family Emergency Shelter Coalition 21455 Birch Street 5 Hayward, CA 94541	Charitable	501(c)3	General support	5,000
John F Kennedy University 100 Ellinwood Way Pleasant Hill, CA 94523	Charitable	501(c)3	Camperships	3,000
My New Red Shoes 330 Twin Dolphin Drive Suite 135 Redwood City, CA 94065	Charitable	501(c)3	General support	3,000
Opportunity Camp 2845 Verne Roberts Circle Antioch, CA 94509	Charitable	501(c)3	Camperships	5,000
The Rock Church 4950 Vista Blvd Sparks, NV 89436	Charitable	501(c)3	General support	2,000
The Salvation Army - Alameda County 130 Doolittle Drive Suite12 San Leandro, CA 94577	Charitable	501(c)3	Christmas food	6,000
San Francisco Opera Assoc 301 Van Ness Avenue San Francisco, CA 94102	Charitable	501(c)3	General support	500
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	5,000
California Assoc of Student Council 1212 Preservation Park Way Oakland, CA 94612	Charitable	501(c)3	Leadership School	2,000
Cazadero Performing Arts Camp PO Box 7908 Berkeley, CA 94707	Charitable	501(c)3	Camperships	3,000
Community Alliance for Learning 1191 Solano Ave Albany, CA 94706	Charitable	501(c)3	Writer/Coach	4,000
Hayward Youth Academy 1065 A Street 204 Hayward, CA 94544	Charitable	501(c)3	General support	700
<b>Total . . . . .</b>				1,440,000 ►
<b>3a</b>				

## 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)				
<b>a Paid during the year</b>				
Homeward Bound Golden Retriever 7495 Natomas Road Elverta, CA 95626	Charitable	501(c)3	General support	500
Oakland Digital Arts & Literacy Ctr 1224 Harrison Street Oakland, CA 94612	Charitable	501(c)3	Inspire Oakland 2	5,000
Reading Partners 180 Grand Avenue 800 Oakland, CA 94612	Charitable	501(c)3	General support	6,000
San Ramon Valley Educ Fund 100 Wilson Road Alamo, CA 94507	Charitable	501(c)3	Various programs	600
San Ramon Valley HS Academic 501 Danville Blvd Danville, CA 94526	Charitable	501(c)3	General support	1,350
Shelter Inc of Contra Costa County 1815 Arnold Drive Martinez, CA 94553	Charitable	501(c)3	Various programs	6,000
Sierra Service Project PO Box 992 Carmichael, CA 95609	Charitable	501(c)3	Camperships	3,000
Teen Esteem PO Box 966 Danville, CA 94526	Charitable	501(c)3	General support	8,500
Tides Cener The Presidio 1014 Tomey Avenue San Francisco, CA 94129	Charitable	501(c)3	Boost! West Oakland	5,000
WCC Salesian Boys & Girls Club PO Box 6120 San Pablo, CA 94806	Charitable	501(c)3	General support	3,000
Womens Cancer Resource Center 5741 Telegraph Avenue Oakland, CA 94609	Charitable	501(c)3	Swim a Mile	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
Camp Phoenix Inc 39931 Parada St B Newark, CA 94560	Charitable	501(c)3	Camperships	5,000
Civics Schools 101 Myrtle St Oakland, CA 94607	Charitable	501(c)3	Food for Thought	2,500
<b>Total . . . . .</b>				1,440,000
<b>3a</b>				

## 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)				
<b>a Paid during the year</b>				
Comm Options For Families & Youth 3478 Buskirk Ave Pleasant Hill, CA 94523	Charitable	501(c)3	General Support	9,000
Lafayette Water Polo Foundation 1015 Hampton Rd Lafayette, CA 94549	Charitable	501(c)3	General Support	1,000
Meals on Wheels Senior Outreach Services 1300 Civic Drive Walnut Creek, CA 94596	Charitable	501(c)3	General Support	3,000
Opportunity Junction Inc 3102 Delta Fair Blvd Antioch, CA 94509	Charitable	501(c)3	General Support	2,500
Rubys Place Inc 1180 B St Hayward, CA 94541	Charitable	501(c)3	General Support	3,000
Safe Families Northern California 1251 Monument Blvd 220 Concord, CA 94520	Charitable	501(c)3	General Support	5,000
Salesian College Preparatory 2851 Salesian Ave Richmond, CA 94804	Charitable	501(c)3	Scholarships	4,000
St Vincent de Paul Society 675 23rd St Oakland, CA 94612	Charitable	501(c)3	Social Service Fund	14,020
Stanford University 450 Serra Mall Stanford, CA 94305	Charitable	501(c)3	General Support	500
A Safe Place Inc PO Box 23006 Oakland, CA 94623	Charitable	501(c)3	General Support	2,000
Acalanes Parents Club 1200 Pleasant Hill Road Lafayette, CA 94549	Charitable	501(c)3	General Support	1,000
Alameda Boys & Girls Club Inc 1900 Third Street Rear Building Alameda, CA 94501	Charitable	501(c)3	Great Futures	3,000
Alameda County Library Foundation 2450 Stevenson Blvd Fremont, CA 94538	Charitable	501(c)3	General Support	4,500
All Stars Helping Kids Inc 2901 Tasman Drive Ste 218 Santa Clara, CA 95054	Charitable	501(c)3	General Support	10,000
ALS Association Golden West Chapter PO Box 565 Agoura Hills, CA 91376	Charitable	501(c)3	Lafayette Run	250
<b>Total . . . . .</b>				1,440,000
<b>3a</b>				

## 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)				
<b>a Paid during the year</b>				
ASPIRAnet 400 Oyster Point Blvd Ste 501 South San Francisco, CA 94080	Charitable	501(c)3	Experience Corps	3,000
Bay Area Outreach & Recreation 3075 Adeline Street Ste 200 Berkeley, CA 94703	Charitable	501(c)3	General Support	3,000
Billy Graham Evang Assn 1 Billy Graham Parkway Charlotte, NC 28201	Charitable	501(c)3	PeaceWithGod	7,500
California Symphony Orchestra 1475 North Broadway Ste 420 Walnut Creek, CA 94596	Charitable	501(c)3	General Support	500
Catholic Charities of The East Bay 3540 Chestnut Ave Concord, CA 94519	Charitable	501(c)3	General Support	1,500
CC Family Justice Alliance 2151 Salvio St Ste 201 Concord, CA 94520	Charitable	501(c)3	General Support	6,500
Community Resources for Science 1611 San Pablo Avenue Ste 10B Berkeley, CA 94702	Charitable	501(c)3	General Support	3,000
Contra Costa Society for Prevention 171 Mayhew Way Ste 101 Pleasant Hill, CA 94523	Charitable	501(c)3	General Support	250
Convenant House 200 Harrison Street Oakland, CA 94607	Charitable	501(c)3	General Support	4,000
CURE International Inc 774 Limekiln Road New Cumberland, PA 17070	Charitable	501(c)3	General Support	2,000
Diabetic Youth Foundation 5167 Clayton Road Ste F Concord, CA 94521	Charitable	501(c)3	General Support	2,500
Friends of Oakland Parks & Recreation PO Box 13267 Oakland, CA 94661	Charitable	501(c)3	Ace Kids Golf Pro	4,000
Girls Inc of Alameda County 433 Estudillo Ave Ste 105 San Leandro, CA 94577	Charitable	501(c)3	Girls College Acc	3,000
Global Student Embassy PO Box 4456 Berkeley, CA 94704	Charitable	501(c)3	Ecuador Relief	1,000
Habitot Childrens Museum 2065 Kittredge Street Berkeley, CA 94704	Charitable	501(c)3	General Support	3,000
<b>Total . . . . .</b>				1,440,000
<b>3a</b>				

## 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)				
<b>a Paid during the year</b>				
Insight Christian School 562 Lewelling Blvd San Leandro, CA 94579	Charitable	501(c)3	Scholarships	5,000
The Interfaith Council of Contra Costa C 1543 Sunnyvale Avenue Walnut Creek, CA 94597	Charitable	501(c)3	Winter Nights Program	6,000
Kenion Training 7 On 7 Team 9000 Crow Canyon Road Ste 146 Danville, CA 94506	Charitable	501(c)3	General Support	1,300
La Cheim School Inc 2853 Groom Drive Richmond, CA 94806	Charitable	501(c)3	Ecolog Outreach	2,500
Marty Tucios Therapeutic Golf 1216 Hemlock Drive Augusta, GA 30909	Charitable	501(c)3	General Support	2,000
Mercy Housing California 2512 River Plaza Drive Ste 200 Sacramento, CA 95833	Charitable	501(c)3	General Support	5,000
Mobility Management Center 150 Del Monte Ave Monterey, CA 93940	Charitable	501(c)3	General Support	2,000
Monument Impact 1760 Clayton Road Concord, CA 94520	Charitable	501(c)3	General Support	4,000
Morning Star Outreach 2415 San Ramon Valley Blvd San Ramon, CA 94583	Charitable	501(c)3	Camperships	2,000
New Life Church 2501 Danville Blvd Alamo, CA 94507	Charitable	501(c)3	General Support	4,000
Okizu Foundation 100 Digital Drive Ste 130 Novato, CA 94949	Charitable	501(c)3	Camperships	5,000
Prescott-Joseph Center For Community 920 Peralta Street Oakland, CA 94607	Charitable	501(c)3	General Support	3,000
PTA CA Congress Stone Valley Middle Sc 3001 Miranda Avenue Alamo, CA 94507	Charitable	501(c)3	General Support	100
Rising Sun Energy Center 2998 San Pablo Ave Berkeley, CA 94702	Charitable	501(c)3	Green Energy Service	5,000
Saint Edward Catholic School 5788 Thornton Avenue Newark, CA 94560	Charitable	501(c)3	Special Needs	2,500
<b>Total . . . . .</b>				1,440,000
<b>3a</b>				

## 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)				
<b>a Paid during the year</b>				
San Francis High School 1885 Miramonte Avenue Mountain View, CA 94040	Charitable	501(c)3	Andrighetto Scholarship Fund	1,000
San Francisco Child Abuse Prevention Ctr 1757 Waller Street San Francisco, CA 94117	Charitable	501(c)3	Social Service Fund	2,500
San Ramon Valley Unified School District 699 Old Orchard Drive Danville, CA 94526	Charitable	501(c)3	General Support	150
Sister 4 Sister PO Box 1651 Antioch, CA 94509	Charitable	501(c)3	General Support	3,000
Stanford School of Medicine 291 Campus Drive Li Ka Shing Bldg Stanford, CA 94305	Charitable	501(c)3	Women's Cancer	5,000
The Childrens Foundation PO Box 1443 Loveland, CO 80539	Charitable	501(c)3	General Support	1,000
The Stanford Review 450 Serra Mall Stanford, CA 94305	Charitable	501(c)3	General Support	500
Womens Centers International 2811 Adeline St Second Floor Oakland, CA 94608	Charitable	501(c)3	General Support	2,000
<b>Total . . . . . ►</b>				1,440,000
<b>3a</b>				

## TY 2016 Accounting Fees Schedule

**Name:** LOWELL BERRY FOUNDATION

**EIN:** 94-6108391

**Software ID:** 16000303

**Software Version:** 2016v3.0

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
Harrison Accounting Group	14,215	711	0	13,504

## TY 2016 Investments - Other Schedule

**Name:** LOWELL BERRY FOUNDATION

**EIN:** 94-6108391

**Software ID:** 16000303

**Software Version:** 2016v3.0

<b>Category/ Item</b>	<b>Listed at Cost or FMV</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
Vanguard Group	FMV	25,258,726	25,258,726
American Funds	FMV	1,959,764	1,959,764

**TY 2016 Land, Etc.  
Schedule****Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 16000303**Software Version:** 2016v3.0

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

## TY 2016 Other Expenses Schedule

**Name:** LOWELL BERRY FOUNDATION

**EIN:** 94-6108391

**Software ID:** 16000303

**Software Version:** 2016v3.0

### Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank charges	25	1		24
Dues & subscriptions	380	19		361
Event Costs	14,785	739		14,046
Insurance	5,753	288		5,465
Office supplies	2,773	139		2,634
Outside Professional Service	14,824	741		14,083
Penalties	5			5
Repairs & maintenance	760	38		722
Telephone	1,926	96		1,830

## TY 2016 Other Increases Schedule

**Name:** LOWELL BERRY FOUNDATION

**EIN:** 94-6108391

**Software ID:** 16000303

**Software Version:** 2016v3.0

Description	Amount
Change in FMV of investment	63,691

## TY 2016 Other Liabilities Schedule

**Name:** LOWELL BERRY FOUNDATION

**EIN:** 94-6108391

**Software ID:** 16000303

**Software Version:** 2016v3.0

<b>Description</b>	<b>Beginning of Year - Book Value</b>	<b>End of Year - Book Value</b>
Payroll tax payable	2,620	3,783
Federal excise tax payable	9,017	

## TY 2016 Taxes Schedule

**Name:** LOWELL BERRY FOUNDATION**EIN:** 94-6108391**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise tax on investment	22,965			22,965
Foreign taxes on dividend income	2,753	2,753		
Payroll taxes	3,332	167		3,165
Personal property taxes	109	5		104
RRF-1 Form	150	8		142
State Form 199 fee	10	1		9
State of CA	20	1		19