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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			
	2 Savings and temporary cash investments			
	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			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	4,601,483	4,199,988	4,751,061
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____ 116,000 Less accumulated depreciation (attach schedule) ▶ _____	116,000	116,000	174,720
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	310,000	260,000	260,000
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,027,483	4,575,988	5,185,781	
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 ▶ _____)	3,284	16,697	
	23 Total liabilities (add lines 17 through 22)	3,284	16,697	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	5,024,199	4,559,291	
30 Total net assets or fund balances (see instructions)	5,024,199	4,559,291		
31 Total liabilities and net assets/fund balances (see instructions) .	5,027,483	4,575,988		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	5,024,199
2 Enter amount from Part I, line 27a	2	-426,180
3 Other increases not included in line 2 (itemize) ▶ _____	3	51,782
4 Add lines 1, 2, and 3	4	4,649,801
5 Decreases not included in line 2 (itemize) ▶ _____	5	90,510
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	4,559,291

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day , yr)	(d) Date sold (mo , day , yr)
1 a CHARLES SCHWAB - ST	P	2016-01-01	2016-12-01
b CHARLES SCHWAB - LT	P	2015-01-01	2016-12-01
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 241,153		243,734	-2,581
b 1,872,472		1,591,996	280,476
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			-2,581
b			280,476
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	277,895
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

☐ Yes
☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	615,022	6,023,878	0 10210
2014	431,556	6,146,771	0 07021
2013	243,882	5,645,528	0 04320
2012	222,337	5,005,743	0 04442
2011	176,209	4,872,499	0 03616

2 Total of line 1, column (d)	2	0 296085
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 059217
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	5,346,928
5 Multiply line 4 by line 3	5	316,629
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,273
7 Add lines 5 and 6	7	319,902
8 Enter qualifying distributions from Part XII, line 4	8	782,577

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	3,273
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	3,273
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	3,273
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	3,371
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	3,371
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	97
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ☐ 1 Refunded ☐	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <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>	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? <i>If "Yes," attach a detailed description of the activities</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T</i>	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	No
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	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	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 ► JEREL WEST Telephone no ► (858) 705-4338			

Located at **►** 1840 NEALE STREET SAN DIEGO CA ZIP+4 **►** 92103

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? 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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(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? ☐ Yes ☒ No If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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 (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)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ☐ Yes ☒ No	5b		No
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 <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
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? ☐ Yes ☒ No <i>If "Yes" to 6b, file Form 8870</i>	6b		No
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? ☐ Yes ☒ No	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	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				

Total number of other employees paid over \$50,000. ☐ Yes ☒ No

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 ACTIVITIES RELATED SOLELY TO GRANT MAKING	685,620
2	
3	
4	

Part IX-B
Summary of Program-Related Investments (see instructions)

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	5,230,199
b	Average of monthly cash balances.	1b	-9,066
c	Fair market value of all other assets (see instructions).	1c	207,220
d	Total (add lines 1a, b, and c).	1d	5,428,353
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	5,428,353
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	81,425
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	5,346,928
6	Minimum investment return. Enter 5% of line 5.	6	267,346

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	267,346
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	3,273
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,273
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	264,073
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	264,073
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	264,073

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	782,577
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	782,577
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	3,273
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	779,304

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 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				264,073
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012.				
c From 2013.				
d From 2014.				28,231
e From 2015.				324,242
f Total of lines 3a through e.	352,473			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 782,577				
a Applied to 2015, 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 2016 distributable amount.				264,073
e Remaining amount distributed out of corpus	518,504			
5 Excess distributions carryover applied to 2016 (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	870,977			
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 2015 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 2017				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 2011 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	870,977			
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.				28,231
d Excess from 2015.				324,242
e Excess from 2016.				518,504

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 ☐ 4942(j)(3) or ☐ 4942(j)(5)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
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))
See Additional Data Table

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
DEBORAH SZEKELY
1840 NEALE STREET
SAN DIEGO, CA 92103
(619) 295-3144

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

c Any submission deadlines
NONE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
NONE

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SEE ATTACHED GRANT LISTING 1840 NEALE STREET SAN DIEGO, CA 92103	None	PC	UNRESTRICTED	680,620
Total			▶ 3a	680,620
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

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			14	36,848	
4 Dividends and interest from securities. . . .			14	51,619	
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			18	277,895	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .				366,362	
13 Total. Add line 12, columns (b), (d), and (e).			13		366,362

(See worksheet in line 13 instructions to verify calculations)

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

Part XVII

- | | Yes | No |
|-------|-----|----|
| 1a(1) | | No |
| 1a(2) | | No |
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |
| 1c | | No |

[illegible]

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Print/Type preparer's name CHRISTOPHER M ROBERTS	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00235008
Firm's name ▶ West Rhode & Roberts				Firm's EIN ▶
Firm's address ▶ 2741 4th Ave San Diego, CA 92103				Phone no (619) 615-5380

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
DEBORAH SZEKELY 1840 NEALE STREET SAN DIEGO, CA 92103	VP AND CFO 1 00	0		
SARA LIVIA BRIGHTWOOD 1840 NEALE STREET SAN DIEGO, CA 92103	President 1 00	0		
MARY WALSHOK 1840 NEALE STREET SAN DIEGO, CA 92103	Secretary 1 00	0		
NED CHAMBERS 1840 NEALE STREET SAN DIEGO, CA 92103	Director 1 00	0		
CHARLIE REILLY 1840 NEALE STREET SAN DIEGO, CA 92103	Board Member 1 00	0		
PETER JENSEN 1840 NEALE STREET SAN DIEGO, CA 92103	Board Member 1 00	0		

Form 990PF Part XV Line 1a - 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).

DEBORAH SZEKELY

MARY WALSHOK

NED CHAMBERS

TY 2016 Accounting Fees Schedule**Name:** SZEKELY FAMILY FOUNDATION**EIN:** 95-3655645**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	1,650	825	0	825
Bookkeeping	9,000	4,500	0	4,500

TY 2016 Investments - Land Schedule**Name:** SZEKELY FAMILY FOUNDATION**EIN:** 95-3655645**Software ID:** 16000303**Software Version:** 2016v3.0

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Land	116,000		116,000	174,720

TY 2016 Other Expenses Schedule**Name:** SZEKELY FAMILY FOUNDATION**EIN:** 95-3655645**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	324			324
COMPUTER	648			648
Dues	3,499			3,499
EDITING	54,065			54,065
INSURANCE EXPENSE	950			950
INVESTMENT EXPENSES	29,124	29,124		29,124
POLITICAL GRANTS	5,000			5,000
SUBSCRIPTIONS	95			95
SUpPLIES	120			120
TRAVEL	1,800			1,800

TY 2016 Other Liabilities Schedule**Name:** SZEKELY FAMILY FOUNDATION**EIN:** 95-3655645**Software ID:** 16000303**Software Version:** 2016v3.0

Description	Beginning of Year - Book Value	End of Year - Book Value
CREDIT CARDS	1,109	740
CHECKING OVERDRAFT	2,175	15,957

TY 2016 Taxes Schedule**Name:** SZEKELY FAMILY FOUNDATION**EIN:** 95-3655645**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	4,640	4,640		
PROPERTY TAXES	922			922
STATE TAXES	85			85

Trillium Asset Management, LLC
REALIZED GAINS AND LOSSES
Szekely Family Foundation
103664

From 01-01-2016 Through 12-31-2016

Open Date	Close Date	Quantity	Security	Cost Basis	Proceeds	Gain or Loss	
						Short Term	Long Term
07-05-2007	02-19-2016	598	Apple Inc	11,179 28	57,639 65		46,460 37
12-28-2015	02-19-2016	717	HSBC Hldgs PLC ADS	28,691 82	22,892 85	-5,798 97	
09-24-2013	02-19-2016	1,131	ITC Hldgs Corp	35,039 68	45,641 04		10,601 36
12-16-2014	02-19-2016	335	ITC Hldgs Corp	13,090 37	13,518 79		428 42
12-27-2013	04-06-2016	50,000	Federal Home Loan Banks 1 625% Due 12-09-16	51,176 03	50,328 50		-847 53
12-24-2008	04-18-2016	770	Jarden Corporation	0 00	16,170 00		16,170 00
12-24-2008	04-19-2016	1	Newell Brands Inc	4 16	32 90		28 74
12-10-2014	05-10-2016	60,000	Ecumenical/Oiko Credit 2 000% Due 01-01-20	60,000 00	60,000 00		0 00
12-16-2014	05-19-2016	245	Discovery Communications A	8,181 95	6,392 27		-1,789 68
02-25-2015	05-19-2016	332	CBRE Group, Inc	11,576 79	9,137 78		-2,439 01
12-16-2014	05-19-2016	34	Costco Wholesale Corp	4,701 70	4,815 68		113 98
02-19-2016	05-19-2016	19	Alphabet Inc Class A	13,705 78	13,563 39	-142 39	
02-25-2015	05-19-2016	18	Alphabet Inc Class A	9,870 73	12,849 52		2,978 79
06-24-2014	05-19-2016	116	Lululemon Athletica Inc	4,809 45	7,068 18		2,258 73
12-16-2014	05-19-2016	81	Palo Alto Networks, Inc	9,482 70	11,274 42		1,791 72
07-05-2007	05-19-2016	69	JM Smucker Co	4,375 99	8,725 78		4,349 79
09-08-2015	05-19-2016	120	TJX Companies Inc	8,629 89	9,040 17	410 28	
06-24-2010	05-19-2016	195	Waters Corporation	13,388 28	26,210 55		12,822 27
12-24-2008	05-19-2016	305	Waters Corporation	11,064 42	40,995 98		29,931 56
02-19-2016	05-19-2016	140	Hartford Financial Services	5,849 46	6,144 26	294 80	
12-16-2014	05-19-2016	245	Adobe Systems Inc	17,844 31	23,456 41		5,612 10
02-25-2015	05-19-2016	124	Eaton Corporation, plc	8,841 54	7,347 08		-1,494 46
12-23-2013	05-19-2016	588	East West Bancorp, Inc	20,644 66	21,865 94		1,221 28
03-24-2014	05-19-2016	301	First Republic Bank	16,650 38	20,958 22		4,307 84
03-24-2014	05-19-2016	214	Home Depot Inc	16,979 14	28,185 96		11,206 82
12-23-2013	05-19-2016	255	Nordstrom, Inc	15,709 60	9,424 84		-6,284 76
09-26-2011	05-19-2016	155	Mastercard Inc	5,149 19	14,664 36		9,515 17

Trillium Asset Management, LLC
REALIZED GAINS AND LOSSES
Szekely Family Foundation
103664

From 01-01-2016 Through 12-31-2016

Open Date	Close Date	Quantity	Security	Cost Basis	Proceeds	Gain or Loss	
						Short Term	Long Term
09-27-2010	05-19-2016	115	Wells Fargo & Co	2,985 62	5,552 90		2,567 28
02-25-2015	05-20-2016	618	Deckers Outdoor Corp	46,315 57	30,880 61		-15,434 96
12-24-2008	05-20-2016	95	Minerals Technologies	1,889 61	5,259 36		3,369 75
12-28-2015	05-24-2016	69	Acuity Brands, Inc	16,604 45	17,581 61	977 16	
12-27-2013	07-14-2016	100,000	Federal Home Loan Banks 1 030% Due 11-21-17	48,455 00	50,000 00		1,545 00
03-16-2016	07-18-2016	75,000	Federal Farm Cr Bks 1 650% Due 06-17-20	75,010 00	75,000 00	-10 00	
12-24-2012	07-25-2016	50,000	Federal Natl Mtg Assn 1 500% Due 10-23-19	49,910 00	50,000 00		90 00
09-24-2013	07-27-2016	924	Charles Schwab Corp	19,824 00	26,591 20		6,767 20
06-24-2014	07-27-2016	373	Charles Schwab Corp	10,150 44	10,734 33		583 89
12-19-2011	08-19-2016	292	Target Corporation	15,094 38	20,554 70		5,460 32
03-24-2014	08-19-2016	380	AFLAC Inc	24,047 96	27,567 43		3,519 47
12-16-2014	08-19-2016	667	ARM Holdings plc	29,586 82	44,095 47		14,508 65
03-24-2014	08-19-2016	130	Home Depot Inc	10,314 43	17,625 30		7,310 87
03-26-2012	08-19-2016	853	Lincoln National Corp	22,975 21	39,007 27		16,032 06
06-24-2014	08-19-2016	564	Lululemon Athletica Inc	23,383 89	45,573 67		22,189 78
07-05-2007	08-19-2016	32	JM Smucker Co	2,029 45	4,916 80		2,887 35
06-24-2010	08-19-2016	33	JM Smucker Co	2,068 69	5,070 45		3,001 76
09-08-2015	08-19-2016	177	United Natural Foods Inc	8,896 62	8,385 73	-510 89	
12-23-2013	08-19-2016	254	United Natural Foods Inc	19,259 82	12,033 75		-7,226 07
12-23-2013	09-06-2016	328	Johnson Controls, Inc	16,643 37	15,066 62		-1,576 75
01-25-2011	09-06-2016	78	Johnson Controls, Inc	3,001 81	3,582 92		581 11
06-24-2010	09-06-2016	225	Johnson Controls, Inc	6,270 48	10,335 34		4,064 86
12-28-2009	09-06-2016	75	Johnson Controls, Inc	2,088 70	3,445 11		1,356 41
09-23-2004	09-06-2016	700	Johnson Controls, Inc	12,808 41	32,154 38		19,345 97
09-06-2016	09-07-2016	1	Johnson Controls International plc	47 83	47 88	0 05	

Trillium Asset Management, LLC
REALIZED GAINS AND LOSSES
Szekely Family Foundation
103664
From 01-01-2016 Through 12-31-2016

Open Date	Close Date	Quantity	Security	Cost Basis	Proceeds	Gain or Loss	
						Short Term	Long Term
06-22-2007	09-12-2016	100,000	American Express Co 5 500% Due 09-12-16	97,137 00	100,000 00		2,863 00
12-28-2015	09-13-2016	54	Acuity Brands, Inc	12,994 78	14,008 36	1,013 58	
11-19-2015	09-13-2016	809	Bank of America Corp	14,433 07	12,744 66	-1,688 41	
06-23-2011	09-13-2016	300	Cerner Corporation	8,720 00	18,590 64		9,870 65
02-19-2016	09-13-2016	580	Hartford Financial Services	24,233 50	24,321 52	88 02	
11-19-2015	09-13-2016	75	Illinois Tool Works Inc	6,934 69	8,688 20	1,753 51	
06-24-2010	09-13-2016	62	JM Smucker Co	3,886 64	8,470 62		4,583 98
09-25-2012	09-13-2016	30	Wabtec Corporation	1,205 08	2,251 97		1,046 89
11-19-2015	09-13-2016	93	Wabtec Corporation	7,256 29	6,981 10	-275 19	
02-25-2015	09-13-2016	94	Zimmer Biomet Holdings, Inc	11,387 86	11,623 31		235 45
02-25-2015	09-26-2016	1,615	CBRE Group, Inc	56,314 78	45,643 44		-10,671 34
09-27-2010	09-26-2016	119	Wells Fargo & Co	3,089 47	5,324 39		2,234 92
06-17-2009	09-26-2016	450	Wells Fargo & Co	10,426 18	20,134 23		9,708 05
03-24-2014	09-26-2016	374	Xilinx Inc	20,451 65	19,637 55		-814 10
03-24-2014	09-26-2016	185	Rockwell Automation Inc	22,551 40	21,236 78		-1,314 62
12-16-2014	09-26-2016	1,576	WisdomTree Investments	22,017 90	15,191 13		-6,826 77
02-25-2015	09-26-2016	10	Zimmer Biomet Holdings, Inc	1,211 47	1,261 11		49 64
03-24-2014	09-27-2016	51	Rockwell Automation Inc	6,216 87	5,871 83		-345 04
12-16-2014	09-27-2016	133	Rockwell Automation Inc	14,042 84	15,312 80		1,269 96
12-16-2014	09-27-2016	858	WisdomTree Investments	11,986 90	8,242 26		-3,744 64
12-19-2011	09-27-2016	61	Zimmer Biomet Holdings, Inc	2,911 95	7,749 69		4,837 74
02-25-2015	09-27-2016	73	Zimmer Biomet Holdings, Inc	8,843 76	9,274 21		430 45
07-01-2013	09-30-2016	65,000	Accion International 1 750% Due 04-01-18	65,000 00	60,000 00		-5,000 00

Trillium Asset Management, LLC
REALIZED GAINS AND LOSSES
Szekely Family Foundation
103664
From 01-01-2016 Through 12-31-2016

Open Date	Close Date	Quantity	Security	Cost Basis	Proceeds	Gain or Loss	
						Short Term	Long Term
12-10-2014	09-30-2016	60,000	Accion International 1 750% Due 04-01-20	60,000 00	65,000 00		5,000 00
10-10-2013	10-18-2016	50,000	African Dev Bank Green Bond	49,863 50	50,000 00		136 50
06-20-2011	10-20-2016	50,000	0 750% Due 10-18-16 IBRD Green Bond	50,400 00	50,000 00		-400 00
10-31-2016	10-31-2016	0	Adient plc Ord Shs	18 63	17 96	-0 67	
11-01-2016	11-01-2016	0	Quality Care Properties, Inc	6 50	5 68	-0 82	
11-19-2015	11-22-2016	1,918	ABB Ltd	36,145 89	39,705 73		3,559 84
12-16-2014	11-22-2016	1,067	Discovery Communications A	35,633 24	29,249 35		-6,383 89
09-27-2016	11-22-2016	472	Discovery Communications A	12,354 36	12,938 79	584 43	
11-19-2015	11-22-2016	333	Illinois Tool Works Inc	30,790 01	41,445 66		10,655 65
10-31-2016	11-23-2016	117	Adient plc Ord Shs	5,450 45	6,517 28	1,066 83	
03-25-2013	11-23-2016	100	Becton Dickinson & Co	9,263 88	16,767 65		7,503 77
01-25-2011	11-23-2016	31	Becton Dickinson & Co	2,627 21	5,197 97		2,570 76
06-17-2009	11-23-2016	169	Becton Dickinson & Co	11,641 90	28,337 33		16,695 43
05-20-2015	11-23-2016	155	Ormat Technologies Inc	5,895 34	7,402 99		1,507 65
11-01-2016	11-23-2016	161	Quality Care Properties, Inc	2,616 25	2,273 82	-342 43	
06-24-2014	11-23-2016	438	Stifel Financial Corp	20,940 15	21,940 94		1,000 79
06-24-2010	12-09-2016	50,000	Federal Home Ln Bks 5 000% Due 12-09-16	56,663 50	50,000 00		-6,663 50
06-18-2012	12-09-2016	150 000	iShares Barclays Agency Bond	17,053 08	16,860 19		-192 89
09-25-2012	12-09-2016	400 000	iShares Barclays Agency Bond	45,571 75	44,960 51		-611 24
06-18-2012	12-13-2016	350 000	iShares Barclays Agency Bond	39,790 52	39,327 04		-463 48

Trillium Asset Management, LLC
 REALIZED GAINS AND LOSSES
Szekely Family Foundation
103664
 From 01-01-2016 Through 12-31-2016

Open Date	Close Date	Quantity	Security	Cost Basis	Proceeds	Gain or Loss	
						Short Term	Long Term
03-24-2014	12-13-2016	300 000	iShares Barclays Agency Bond	33,450 31	33,708 90		258 59
TOTAL GAINS						6,188 66	361,000 37
TOTAL LOSSES						-8,769 78	-80,524 73
TOTAL REALIZED GAIN/LOSS						277,894 52	
NO CAPITAL GAINS DISTRIBUTIONS							

**Szekely Family Foundation
2016 Grants**

Date	Name	Address	City and State	Amount
01/06/16	Fortunate Blessings Foundation	409 Bantam Road, A-3	Litchfield, CT 06759	6,000 00
01/20/16	San Diego Canyonlands	3552 Bancroft Street	San Diego, CA 92104	1,000 00
02/04/16	Amnesty Leadership Group	5 Penn Plaza	New York, NY 10001	5,000 00
02/04/16	Living Tao Foundation	PO Box 1908	Gold Beach OR 97444	500 00
02/04/16	Planned Parenthood Fed of Amer	PO Box 97166	Washington, DC 20090-7166	1,000 00
02/19/16	Matter Movement	2150 Allston Way #460	Berkeley, CA 94704	5,000 00
02/29/16	Center for Climate Protection	PO Box 3785	Santa Rosa, CA 95402	1,000 00
02/29/16	Compassion & Choices	4155 E Jewell Ave Ste 200	Denver CO 80222	1,000 00
02/29/16	Consumer Reports Foundation	PO Box 96551	Washington, DC 20090-6551	1,000 00
02/29/16	Food & Water Watch	1814 Franklin St Ste 1100	Oakland, CA 94612	5,000 00
03/03/16	Bastyr University	14500 Juanita Dr NE	Kenmore, WA 98028-9906	1,000 00
03/03/16	Boys & Girls Club Of Vista	410 W California Ave	Vista, CA 92083	1,000 00
03/03/16	Las Patronas	PO Box 1888	La Jolla, CA 92038	5,500 00
03/03/16	McAlister Institute	1400 N Johnson Ave #101	El Cajon, CA 92020	5,000 00
03/09/16	Berry Good Food Foundation	Internet		255 80
03/09/16	San Diego Opera	233 A Street, Ste 500	San Diego, CA 92101	120 00
03/10/16	CSPI/Nutrition Action	1220 L Street, NW, Suite 300	Washington, DC 20005	5,000 00
03/24/16	KPBS	5200 Campanile Dr	San Diego, CA 92182-5400	1,200 00
03/24/16	Women's Earth and Climate Caucus	20 Sunnyside Ave Ste A-438	Mill Valley, CA 94941	5,000 00
03/31/16	Inewsource	5500 Campanile Drive PSFA 361C	San Diego, CA 92182	5,000 00
03/31/16	KPBS	5200 Campanile Dr	San Diego, CA 92182-5400	5,000 00
04/19/16	Amigos De Los Californios	1831 Lendee Drive	Escondido, CA 92025	2,000 00
04/19/16	CentroNia	1420 Columbia Road NW	Washington, DC 20009	94 00
04/19/16	Charter One Hundred	PO Box 1453	La Jolla, CA 92038	200 00
04/19/16	Earth Island Institute	7300 Evergreen Avenue	Kelseyville CA 95451	2,500 00
04/19/16	League of Conservation Voters	1920 L Street NW Ste 800	Washington, DC 20036	2,500 00
04/19/16	Lakeside River Park Conservancy	12108 Industry Road	Lakeside, CA 92040	1,000 00
04/19/16	NRDC - Natural Resources Defense Council	40 West 20th Street	New York, NY 10011	2,000 00
04/19/16	San Diego Public Library Foundation	PO Box 120391	San Diego, CA 92112	250 00
04/21/16	Alliance San Diego	PO Box 12267	New York, NY 10004-2400	250 00
04/21/16	Ilan Lael Foundation	PO Box 1221	Julian, CA 92036	750 00
04/21/16	Jackie Robinson Family YMCA	4902 Market Street	San Diego, CA 92102	5,000 00
04/22/16	California Rural Legal Assistance	1430 Franklin St Ste 103	Oakland, CA 94612	250 00
04/22/16	Catching The Dream	8200 Mountain Road, N E , Ste 103	Albuquerque, NM 87110	2,000 00

**Szekely Family Foundation
2016 Grants**

Date	Name	Address	City and State	Amount
04/22/16	New American Museum	2825 Dewey Road, Ste 102	San Diego, CA 92106	25,000 00
05/04/16	Francis Parker School	6501 Linda Vista Rd	San Diego, CA 92111	100 00
05/04/16	San Diego River Park Foundation	PO Box 80126	San Diego, CA 92138-0126	5,000 00
05/16/16	San Diego Young Artists Music Academy	4125 Alpha Street, Ste A	San Diego, CA 92113	5,000 00
05/16/16	United Way of San Diego County	4699 Murphy Canyon Rd	San Diego, CA 92123-9971	100 00
05/16/16	World Jewish Congress	501 Madison Avenue	New York, NY 10021	1,000 00
05/25/16	San Diego Heart Association	9404 Genesee Ave #240	La Jolla, CA 92037	1,000 00
05/25/16	San Diego Hunger Coalition	4305 University Ave #514	San Diego, CA 92105	5,000 00
06/06/16	San Diego Grantmakers	5060 Shoreham Pl, Ste 350	San Diego, CA 92122	3,750 00
06/06/16	Challenge Center	5540 Lake Park Way	La Mesa, CA 91942	1,000 00
06/06/16	Multiple Sclerosis Society			250 00
06/06/16	San Diego Natural History Museum	PO Box 121390	San Diego, CA 92112-1390	5,000 00
06/06/16	San Diego Opera	233 A Street, Ste 500	San Diego, CA 92101	600 00
06/06/16	San Diego Public Library Foundation	PO Box 120391	San Diego, CA 92112	5,000 00
06/10/16	Earthjustice	50 California St, Ste 500	San Francisco, CA 94111-9846	2,000 00
06/29/16	Institute of the Americas	10111 N Torrey Pines Road	La Jolla, CA 92037	4,400 00
06/29/16	Olivewood Garden	2525 N Ave	National City, CA 91950	100 00
07/06/16	Claremont Graduate University	165 East 10th Street	Claremont, CA 91711-6180	2,500 00
07/06/16	Committee of 200	980 N Michigan Ave, Ste 1575	Chicago, IL 60611-7540	500 00
07/06/16	Common Cause	1133 19th St NW 9th Floor	Washington, DC 20036	5,000 00
07/06/16	Congressional Management Foundation	710 E Street SE	Washington, DC 20003-2840	5,000 00
07/07/16	San Diego Repertory Theatre	79 Horton Plaza	San Diego, CA 92101	10,000 00
07/07/16	San Diego Repertory Theatre	79 Horton Plaza	San Diego, CA 92101	50 00
07/11/16	Inewsresource	5500 Campanile Drive PSFA 361C	San Diego, CA 92182	10,000 00
07/11/16	Old Globe Theatre	PO Box 122171	San Diego, CA 92112-2171	10,000 00
07/21/16	Shabbos Shul	PO Box 880	Lakespur, CA 94977	5,500 00
07/26/16	Wellness Warnor	1840 Neale Street	San Diego, CA 92103	1,000 00
07/27/16	San Diego History Center	1649 El Prado Ste 3	San Diego, CA 92101	5,000 00
08/10/16	Central Asia Institute	P O Box 7209	Bozeman, MT 59771	2,000 00
08/10/16	Clean Water Action	1444 Eye Street NW, Ste 400	Washington DC 20005	500 00
08/10/16	Council on Foreign Relations	Internet		1,000 00
08/10/16	East County Youth Symphony	PO Box 25	El Cajon, CA 92022	500 00
08/10/16	Marrn Agricultural Land Trust	P O Box 809	Point Reyes Station, CA 94956	2,000 00
08/10/16	Nature Conservancy	PO Box 1556	Merrifield VA 22116-9590	2,000 00

**Szekely Family Foundation
2016 Grants**

Date	Name	Address	City and State	Amount
08/10/16	NCAP	PO Box 1393	Eugene OR 97440-1393	1,000 00
08/10/16	NRDC - Natural Resources Defense Council	40 West 20th Street	New York, NY 10011	2,500 00
08/10/16	San Diego Museum of Art			50 00
08/10/16	UC San Diego Foundation	9500 Gilman Drive Dept 0175G	La Jolla, CA 92093-0175	500 00
08/10/16	US-Mexico Border Philanthropy Ptship	2508 Historic Decatur Rd , Suite 130	San Diego, CA 92106	5,000 00
08/29/16	San Diego Hunger Coalition	4305 University Ave #514	San Diego, CA 92105	7,500 00
08/29/16	Voice of San Diego	2508 Historic Decatur Road, Ste 120	San Diego, CA 92106	500 00
08/31/16	Civil Eats	Internet		1,000 00
08/31/16	Sustainable Markets Fdn for Civil Eats			1,000 00
09/08/16	Common Cause	1133 19th St NW 9th Floor	Washington DC 20036	250 00
09/08/16	National Council of La Raza (NCLA)	1126 16th Street, NW, Suite 600	Washington, DC 20036	500 00
09/14/16	Shelburn Farms	1611 Harbor Road	Shelburne, VT 05482	5,000 00
09/23/16	San Diego Aids Walk			250 00
09/23/16	Slow Food USA			250 00
09/26/16	San Diego Foundation	2508 Historic Decatur Rd #200	San Diego, CA 92106	50,000 00
09/28/16	New American Museum	2825 Dewey Road, Ste 102	San Diego, CA 92106	50,000 00
10/06/16	350 Org	20 Jay Street, Suite 732	Brooklyn, NY 11201	2,000 00
10/06/16	Beyond Pesticides	701 E Street, SE, Ste 200	Washington, DC 20003-2841	2,500 00
10/10/16	Street of Dreams	4215 Menlo Ave	San Diego, CA 92115	5,000 00
10/13/16	Marin Shakespeare Company			2,000 00
10/16/16	KPBS	5200 Campanile Dr	San Diego, CA 92182-5400	5,000 00
11/10/16	Japanese Friendship Garden	2125 Park Blvd , Suite 2	San Diego, CA 92101	10,000 00
11/10/16	NRDC - Natural Resources Defense Council	40 West 20th Street	New York, NY 10011	10,000 00
11/10/16	San Diego Art Institute	1439 El Prado	San Diego, CA 92101	3,000 00
11/10/16	UC San Diego Foundation	9500 Gilman Drive Dept 0175G	La Jolla, CA 92093-0175	1,250 00
11/10/16	UPAC	1031 25th Street	San Diego, CA 92101	1,000 00
11/10/16	World Jewish Congress	501 Madison Avenue	New York, NY 10021	2,500 00
11/14/16	Global Wellness Institute	333 S E 2nd Avenue, Ste 3750	Miami, FL 33131	2,500 00
11/22/16	League of Conservation Voters	1920 L Street NW Ste 800	Washington, DC	2,000 00
11/22/16	ACLU Foundation	125 Broad Street, 18th Floor	San Diego, CA 92112	2,000 00
11/22/16	Clean Water Fund	350 Frqank H Ogawa Plaza	Oakland, CA 94612	2,000 00
11/22/16	CSPI/Nutrition Action	1220 L Street, NW, Suite 300	Washington, DC 20005	5,000 00
11/22/16	San Diego Repertory Theatre	79 Horton Plaza	San Diego, CA 92101	2,500 00
11/22/16	Save Our Heritage Organization	2476 San Diego Avenue	San Diego, CA 92110	250 00

**Szekely Family Foundation
2016 Grants**

Date	Name	Address	City and State	Amount
11/22/16	Schurig Center	1132 Magnolia Ave	Lakespur, CA 94939	500 00
11/22/16	Wellness Warrior	1840 Neale Street	San Diego, CA 92103	2,000 00
11/30/16	Anti-Defamation League	4950 Murphy Canyon Rd #250	San Diego, CA 92123	2,500 00
11/30/16	Voice of San Diego	2508 Historic Decatur Road, Ste 120	San Diego, CA 92106	2,500 00
12/01/16	AARP Foundation	PO Box 93207	Long Beach, CA 90809-3207	100 00
12/02/16	Committee of 200	980 N Michigan Ave, Ste 1575	Chicago, IL 60611-7540	2,500 00
12/02/16	Partners of Livable Communities	1429 21st St NW	Washington, DC 20036	1,000 00
12/09/16	Freelance Investigative Reporters & Editors	141 Neff Annex, UMC	Columbia, MO 65211	2,000 00
12/16/16	Go Fund Me - Julie Shafer			1,000 00
12/23/16	League of Conservation Voters	1920 L Street NW Ste 800	Washington, DC 20036	3,000 00
12/22/16	Wild Farms Alliance	PO Box 2570	Watsonville, CA 95077	1,000 00
12/23/16	Rachel's Women's Center	759 Eighth Avenue	San Diego, CA 92101	5,000 00
12/23/16	Greenpeace	702 H Street NW, Ste 300	Washington, DC 20001	2,000 00
12/23/16	Food First	398 60th Street	Oakland, CA 94618-1212	2,000 00
12/23/16	San Diego Botanical Garden	230 Quail Gardens Dr	Encinitas, CA 92024	5,000 00
12/23/16	Alliance For Sustainability	2801 21st Ave Ste 100	Minneapolis, MN 55407	1,000 00
12/23/16	LeaderSpring	655 13th St Ste 100	Oakland, CA 94612	5,000 00
12/23/16	LymeLight Foundation	229 Burlingame Avenue, Suite 205	Burlingame, CA 94010	20,000 00
12/23/16	California Revels	337 17th Street, Suite 209	Oakland, CA 94612	1,000 00
12/23/16	International Community Foundation	2505 N Avenue	National City, CA 91950	2,500 00
12/23/16	AlterNet	Dept 16GEN, 1861 Harmon St	Berkeley, CA 94703	2,000 00
12/23/16	Libana Inc	PO Box 400530	Cambridge, MA 02140	250 00
12/23/16	Environmental Defense Fund	257 Park Avenue South	New York, NY 10010	1,000 00
12/29/16	World Jewish Congress			250 00
02/22/16	Body Positive	PO Box 7801	Berkeley CA 94707	25,000 00
03/25/16	Global Student Embassy	PO Box 4456	Berkeley, CA 94704	10,000 00
04/19/16	Americas Foundation	PO Box 574	Chula Vista, CA 91912	5,000 00
07/06/16	Earth Guardians	3980 Broadway #103-229	Boulder, CO 80304	20,000 00
07/11/16	Operation Diana Inc	46 Gordon Street	Sausalito, CA 94965	5,000 00
07/27/16	Americas Foundation	PO Box 574	Chula Vista, CA 91912	5,000 00
07/27/16	Commonweal	P O Box 316	Bolinas, CA 94924	5,000 00
07/27/16	E-LAW	1877 Garden Ave	Eugene, OR 97403	25,000 00
07/27/16	Esalen Institute	55000 Highway One	Big Sur, CA 93920	10,000 00
07/27/16	Mosaic Multicultural Foundation	4218-1/2 SW Alaska, Suite H	Seattle, WA 98116	20,000 00

**Szekely Family Foundation
2016 Grants**

Date	Name	Address	City and State	Amount
07/27/16	Pomegranate Center	PO Box 486	Issaquah, WA 98027	—
07/27/16	Power Of Hope	PO Box 1481	Langley WA 98260	10,000 00
07/27/16	Wetlands Conservancy	4640 SW Macadam #50	Portland, OR 97239	10,000 00
09/01/16	Los Cimientos Alliance	234 Cleveland Ave.	Mill Valley, CA 94941	25,000 00
09/12/16	Earth Guardians	3980 Broadway #103-229	Boulder, CO 80304	10,000 00
10/03/16	Chochmat Ha'lev	2144A California St	Berkeley, CA 94703	5,000 00
10/05/16	Amigos Hospitalito Atitlan	2220 Shallow Well Rd	Manakin, VA 23103	2,000 00
11/09/16	Pachamama Alliance	P O Box 29191	San Francisco, CA 94129	5,000 00
11/10/16	Partners for Youth Empowerment	PO Box 1481	Langley WA 98260	2,000 00
11/22/16	Bioneers	1607 Paseo de Peralta, Ste 3	Santa Fe, NM 87501	5,000 00
11/22/16	Earth Justice	50 California St, Ste 500	San Francisco, CA 94111-9846	4,000 00
12/22/16	Ilan Lael Foundation	PO Box 1221	Julian, CA 92036	5,500 00
Total				680,619 80