

For calendar year 2017, or tax year beginning 01-01-2017, and ending 12-31-2017

Name of foundation CONNIE AND BOB LURIE FOUNDATION INC		A Employer identification number 20-8004479	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 610043		Room/suite	B Telephone number (see instructions) (650) 320-1782
City or town, state or province, country, and ZIP or foreign postal code REDWOOD CITY, CA 940610043		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 32,332,141	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	2,709,143			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	36,231	36,231		
	4 Dividends and interest from securities	368,077	368,077		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	4,343,250			
	b Gross sales price for all assets on line 6a 15,750,501				
	7 Capital gain net income (from Part IV, line 2)		4,343,250		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	7,456,701	4,747,558		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	7,913	2,121		5,792
	c Other professional fees (attach schedule)	154,358	154,358		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	10,207			207
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	154	42		112
	24 Total operating and administrative expenses. Add lines 13 through 23	172,632	156,521		6,111
	25 Contributions, gifts, grants paid	2,312,215			2,312,215
	26 Total expenses and disbursements. Add lines 24 and 25	2,484,847	156,521		2,318,326
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	4,971,854			
	b Net investment income (if negative, enter -0-)		4,591,037		
c Adjusted net income(if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	1,020,225	3,038,645	3,038,645
	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)	300,000		
	b Investments—corporate stock (attach schedule)	16,892,312	 16,188,498	22,162,529
	c Investments—corporate bonds (attach schedule)	1,531,464	 940,068	900,022
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	2,944,038	 6,264,217	6,230,945
	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)	22,688,039	26,431,428	32,332,141	
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 ▶ _____)			
	23 Total liabilities (add lines 17 through 22)		0	
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	22,688,039	26,431,428	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	22,688,039	26,431,428	
31 Total liabilities and net assets/fund balances (see instructions) .	22,688,039	26,431,428		

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	22,688,039
2 Enter amount from Part I, line 27a	2	4,971,854
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	27,659,893
5 Decreases not included in line 2 (itemize) ▶ _____ 	5	1,228,465
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	26,431,428

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 SCHWAB ACCOUNT (VARIOUS SECURITIES)	P	2016-01-01	2017-12-31
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 15,750,501		11,407,251	4,343,250
b			
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			4,343,250
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	4,343,250
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))
2016	1,310,112	22,551,102	0 058095
2015	1,288,809	21,781,899	0 059169
2014	1,000,828	19,798,281	0 050551
2013	907,326	17,973,859	0 050480
2012	817,107	17,209,760	0 047479

2 Total of line 1, column (d)	2	0 265774
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 053155
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	27,391,371
5 Multiply line 4 by line 3	5	1,455,988
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	45,910
7 Add lines 5 and 6	7	1,501,898
8 Enter qualifying distributions from Part XII, line 4	8	2,318,326

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	45,910
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	45,910
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	45,910
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	42,678
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	87,678
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	58
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	41,710
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ☐ 41,710 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	
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	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) ☐ DE		
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 2017 or the taxable year beginning in 2017 (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 CONNIE L LURIE Telephone no (650) 320-1782			

Located at **PO BOX 610043 PO BOX 610043 REDWOOD CITY CA** ZIP+4 **94061**

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 2017, 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		
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 2017? ☐	1c		
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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ 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		
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 2017 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 2017). ☐	3b		
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 2017?	4b		No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (Continued)

5a	During the year did the foundation pay or incur any amount to				
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes	☒ No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☒ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes	☒ No		
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions).	☐ Yes	☒ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes	☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b			
	Organizations relying on a current notice regarding disaster assistance check here.		☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?		☐ Yes	☐ No	
	<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?	6b		No	
	<i>If "Yes" to 6b, file Form 8870</i>				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		☐ Yes	☒ No	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b			

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
ROBERT A LURIE PO BOX 610043 REDWOOD CITY, CA 940610043	VICE PRESIDE 1 00	0	0	0
CONNIE L LURIE PO BOX 610043 REDWOOD CITY, CA 940610043	PRESIDENT/SE 4 00	0	0	0

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. ►**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
ENSEMBLE CAPITAL MANAGEMENT LLC ENSEMBLE CAPITAL MANAGEMENT LLC 1350 BAYSHORE HIGHWAY STE 460 1350 BAYSHORE HIGHWAY STE 460 BURLINGAME, CA 94010	INVESTMENT	154,358

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	
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 N/A	
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	26,292,452
b	Average of monthly cash balances.	1b	1,516,046
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	27,808,498
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	27,808,498
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	417,127
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	27,391,371
6	Minimum investment return. Enter 5% of line 5.	6	1,369,569

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

1	Minimum investment return from Part X, line 6.	1	1,369,569
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	45,910
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	45,910
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,323,659
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,323,659
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	1,323,659

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	2,318,326
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	2,318,326
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	45,910
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,272,416

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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				1,323,659
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			178,191	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017				
a From 2012.				
b From 2013.				
c From 2014.				
d From 2015.				
e From 2016.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>2,318,326</u>				
a Applied to 2016, but not more than line 2a			178,191	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2017 distributable amount.				1,323,659
e Remaining amount distributed out of corpus	816,476			
5 Excess distributions carryover applied to 2017 (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	816,476			
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 2016 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				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 2012 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	816,476			
10 Analysis of line 9				
a Excess from 2013.				
b Excess from 2014.				
c Excess from 2015.				
d Excess from 2016.				
e Excess from 2017.	816,476			

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 2017, 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
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))
CONNIE L AND BOB A LURIE

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 email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	2,312,215
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	36,231	
4 Dividends and interest from securities.			14	368,077	
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	4,343,250	
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).				4,747,558	
13 Total. Add line 12, columns (b), (d), and (e).			13		4,747,558

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.	***** 2018-11-08 *****	May the IRS discuss this return with the preparer shown below? (see instr.)? ☒ Yes ☐ No
	Signature of officer or trustee	Date	Title

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	KARIFA DIAWARA		2018-11-15		P00845765
	Firm's name ▶ DIAWARA & ASSOCIATES CPAS				Firm's EIN ▶ 26-2480144
	Firm's address ▶ 2225 EAST BAYSHORE ROAD SUITE 200 PALO ALTO, CA 94303				Phone no (650) 320-1782

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
A HOME AWAY FROM HOMELESSNESS A HOME AWAY FROM HOMELESSNESS 33 FORT MASON 10 33 FOR MAASON 10 SAN FRANCISCO, CA 94123	NONE	501(C)(3)	CHARITY	1,000
ACHIEVE ACHIEVE1400 16TH STREET NW 510 1400 16TH STREET NW 510 WASHINGTON, DC 20036	NONE	501(C)(3)	CHARITY	5,000
AIM HIGH AIM HIGH2030 HARRISON ST 2030 HARRISON ST SAN FRANCISCO, CA 94110	NONE	501(C)(3)	CHARITY	50,000
Total ▶ 3a				2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN HEART ASSOCIATION AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVE 7272 GREENVILLE AVE DALLAS, TX 75231	NONE	501(C)(3)	CHARITY	1,000
AMERICAN INDIAN COLLEGE FUND AMERICAN INDIAN COLLEGE FUND 8333 GREENWOOD BLVD 120 8333 GREENWOOD BLVD 120 DENVER, CO 80221	NONE	501(C)(3)	CHARITY	5,000
ARCS FOUNDATION ARCS FOUNDATION 1008 GENERAL KENNEDY AVE 1008 GENERAL KENNEDY AVE SAN FRANCISCO, CA 94129	NONE	501(C)(3)	CHARITY	1,000
Total ► 3a				2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AT THE CROSSROADS AT THE CROSSROADS 38 MASON STREET 38 MASON STREET SAN FRANCISCO, CA 94102	NONE	501(C)(3)	CHARITY	102,500
BARBARA SINATRA CHILDREN'S CENTER BARBARA SINATRA CHILDREN'S CENTER 39000 BOB HOPE DR 39000 BOB HOPE DR RANCHO MIRAGE, CA 92270	NONE	501(C)(3)	CHARITY	5,000
BAY AREA SPORTS HALL OF FAME BAY AREA SPORTS HALL OF FAME 465 CALIFORNIA ST 806 465 CALIFORNIA ST 806 SAN FRANCISCO, CA 94104	NONE	501(C)(3)	CHARITY	2,500
Total ► 3a				2,312,215

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BAY AREA WOMEN'S AND CHILDREN'S CTR BAY AREA WOMEN'S AND CHILDREN'S CTR 318 LEAVENWORTH ST 318 LEAVENWORTH ST SAN FRANCISCO, CA 94102	NONE	501(C)(3)	CHARITY	2,500
BOYS & GIRLS CLUBS OF COACHELLA V BOYS & GIRLS CLUBS OF COACHELLA V 42-600 COOK ST STE 120 42-600 COOK ST STE 120 PALM DESERT, CA 92211	NONE	501(C)(3)	CHARITY	225,000
BOYS & GIRLS CLUBS OF THE PENINSULA BOYS & GIRLS CLUBS OF THE PENINSULA 401 PIERCE ROAD 401 PIERCE ROAD MENLO PARK, CA 94025	NONE	501(C)(3)	CHARITY	358,335
Total 3a				2,312,215

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOYS & GIRLS CLUBS OF TRACY BOYS & GIRLS CLUBS OF TRACY 753 W LOWELL AVE 753 W LOWELL AVE TRACY, CA 95376	NONE	501(C)(3)	CHARITY	5,000
CALIFORNIA HISTORICAL SOCIETY CALIFORNIA HISTORICAL SOCIETY 678 MISSION ST 678 MISSION ST SAN FRANCISCO, CA 94105	NONE	501(C)(3)	CHARITY	500
CALMATTERS CALMATTERS1201 K ST STE 1200 1201 K ST STE 1200 SACRAMENTO, CA 95814	NONE	501(C)(3)	CHARITY	1,000
Total ▶ 3a				2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CARREON FOUNDATION CARREON FOUNDATION 40101 MONTEREY AVE 40101 MONTEREY AVE RANCHO MIRAGE, CA 92270	NONE	501(C)(3)	CHARITY	5,000
CASA SAN MATEO COUNTY CASA SAN MATEO COUNTY 330 TWIN DOLPHIN DR 330 TWIN DOLPHIN DR139 REDWOOD CITY, CA 94065	NONE	501(C)(3)	CHARITY	5,000
CASA SILICON VALLEY CASA SILICON VALLEY 509 VALLEY WAY BLD 2 509 VALLEY WAY BLD 2 MILPITAS, CA 95035	NONE	501(C)(3)	CHARITY	5,000
Total ► 3a				2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CHRONICLE SEASON OF SHARING CHRONICLE SEASON OF SHARING PO BOX 44740 PO BOX 44740 SAN FRANCISCO, CA 94144	NONE	501(C)(3)	CHARITY	10,000
COLLEGE OF THE DESERT COLLEGE OF THE DESERT 43-500 MONTEREY AVE 43-500 MONTEREY AVE PALM DESERT, CA 92260	NONE	501(C)(3)	NONE	5,000
CONGREGATION EMANU-EL CONGREGATION EMANU-EL2 LAKE ST 2 LAKE ST SAN FRANCISCO, CA 94118	NONE	501(C)(3)	CHARITY	10,000
Total ▶ 3a				2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DAMON RUNYON CANCER RESEARCH FND DAMON RUNYON CANCER RESEARCH FND 55 BROADWAY STE 302 55 BROADWAY STE 302 NEW YORK, NY 10006	NONE	501(C)(3)	CHARITY	13,000
EISENHOWER MEDICAL CENTER EISENHOWER MEDICAL CENTER 39000 BOB HOPE DR 39000 BOB HOPE DR RANCHO MIRAGE, CA 92270	NONE	501(C)(3)	CHARITY	252,000
EXPLORATORIUM EXPLORATORIUM PIER 15 THE EMBARCADERO PIER 15 THE EMBARCADERO SAN FRANCISCO, CA 94111	NONE	501(C)(3)	CHARITY	25,000
Total 				3a 2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GREENLIGHT CLINIC GREENLIGHT CLINIC 1808 WEDEMEYER ST B-10 1808 WEDEMEYER ST B-10 SAN FRANCISCO, CA 94129	NONE	501(C)(3)	CHARITY	1,000
HABITAT FOR HUMANITY - SF HABITAT FOR HUMANITY - SF 500 WASHINGTON ST 250 500 WASHINGTON ST 250 SAN FRANCISCO, CA 94111	NONE	501(C)(3)	CHARITY	101,000
KDFC (PUBLIC RADIO) KDFC (PUBLIC RADIO) 201 THIRD ST STE 1200 201 THIRD ST STE 1200 SAN FRANCISCO, CA 94103	NONE	501(C)(3)	CHARITY	1,000
Total ► 3a				2,312,215

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
KIPP BAY AREA SCHOOLS KIPP BAY AREA SCHOOLS 1404 FRANKLIN ST STE 500 1404 FRANKLIN ST STE 500 OAKLAND, CA 94612	NONE	501(C)(3)	CHARITY	100,000
LOVE&LOVE TENNIS FOUNDATION LOVE&LOVE TENNIS FOUNDATION 810 SNOW CREEK CYN 810 SNOW CREEK CYN PALM DESERT, CA 92211	NONE	501(C)(3)	CHARITY	1,000
MONTEREY BAY AQUARIUM FND MONTEREY BAY AQUARIUM FND 886 CANNERY ROW 886 CANNERY ROW MONTEREY, CA 93940	NONE	501(C)(3)	CHARITY	260,000
Total ► 3a				2,312,215

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MENLO SCHOOL MENLO SCHOOL50 VALPARAISO AVE 50 VALPARAISO AVE ATHERTON, CA 94027	NONE	501(C)(3)	CHARITY	250,000
MERCY WITHOUT BORDERS MERCY WITHOUT BORDERS 1885 DE LA CRUZ BLVD 101 1885 DE LA CRUZ BLVD 101 SANTA CLARA, CA 95050	NONE	501(C)(3)	CHARITY	2,000
NARAL FOUNDATION NARAL FOUNDATION 335 S VAN NESS AVE 335 S VAN NESS AVE SAN FRANCISCO, CA 94111	NONE	501(C)(3)	CHARITY	10,000
Total ▶ 3a				2,312,215

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NORTHWESTERN UNIVERSITY NORTHWESTERN UNIVERSITY 633 CLARK ST 633 CLARK ST EVANSTON, IL 60208	NONE	501(C)(3)	CHARITY	10,000
NRDC NRDC111 SUTTER ST 20 111 SUTTER ST 20 SAN FRANCISCO, CA 94104	NONE	501(C)(3)	CHARITY	1,000
PALM DESERT CAMPUS CSU PALM DESERT CAMPUS CSU 37500 COOK ST 37500 COOK ST PALM DESERT, CA 92211	NONE	501(C)(3)	CHARITY	1,000
Total ▶ 3a				2,312,215

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PALM SPRINGS ART MUSEUM PALM SPRINGS ART MUSEUM 101 N MUSEUM DR 101 N MUSEUM DR PALM SPRINGS, CA 92262	NONE	501(C)(3)	CHARITY	1,000
PANETTA INSTITUTE PANETTA INSTITUTE 2051 INTER-GARRISON RD 2051 INTER-GARRISON RD MARINA, CA 93933	NONE	501(C)(3)	CHARITY	1,000
PGA REACH PGA REACH601-799 STEVENSON ST 601-799 STEVENSON ST VACAVILLE, CA 95688	NONE	501(C)(3)	CHARITY	1,000
Total ▶ 3a				2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PENINSULA COLLEGE FUND PENINSULA COLLEGE FUND 330 TWIN DOLPHIN DR 131 330 TWIN DOLPHIN DR 131 REDWOOD CITY, CA 94065	NONE	501(C)(3)	CHARITY	25,000
PHILANTHROPIC VENTURES FOUNDATION PHILANTHROPIC VENTURES FOUNDATION 1222 PRESERVATION PARK WY 1222 PRESERVATION PARK WY OAKLAND, CA 946121201	NONE	501(C)(3)	CHARITY	5,000
RANCHO MIRAGE WRITERS FESTIVAL RANCHO MIRAGE WRITERS FESTIVAL 71-100 CA-111 71-100 CA-111 RANCHO MIRAGE, CA 92270	NONE	501(C)(3)	CHARITY	5,000
Total 				3a 2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RIORDAN HIGH SCHOOL RIORDAN HIGH SCHOOL 175 PHELAN AVE 175 PHELAN AVE SAN FRANCISCO, CA 94112	NONE	501(C)(3)	CHARITY	1,000
RISING INTERNATIONAL RISING INTERNATIONAL 300 POTRERO ST 300 POTRERO ST SANTA CRUZ, CA 95060	NONE	501(C)(3)	CHARITY	1,000
SAN JOSE STATE UNIVERSITY SAN JOSE STATE UNIVERSITY 1 WASHINGTON SQUARE 1 WASHINGTON SQUARE SAN JOSE, CA 95192	NONE	501(C)(3)	CHARITY	1,300
Total ▶ 3a				2,312,215

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SF GIANTS COMMUNITY FUND SF GIANTS COMMUNITY FUND 24 WILLIE MAYS PLAZA 24 WILLIE MAYS PLAZA SAN FRANCISCO, CA 94107	NONE	501(C)(3)	CHARITY	1,000
SF JAZZ SF JAZZ201 FRANKLIN ST 201 FRANKLIN ST SAN FRANCISCO, CA 94102	NONE	501(C)(3)	CHARITY	3,000
SF OPERA GUILD SF OPERA GUILD301 VAN NESS AVE 301 VAN NESS AVE SAN FRANCISCO, CA 94102	NONE	501(C)(3)	CHARITY	5,000
Total 3a				2,312,215

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SF ZOO SF ZOOSLOAT BLVD SLOAT BLVD SAN FRANCISCO, CA 94132	NONE	501(C)(3)	CHARITY	5,000
SILICON VALLEY EDUCATION FND SILICON VALLEY EDUCATION FND 1400 PARKMOOR AVE STE200 1400 PARKMOOR AVE STE200 SAN JOSE, CA 95126	NONE	501(C)(3)	CHARITY	25,000
ST FRANCIS CENTER ST FRANCIS CENTER 151 BUCKINGHAM AVE 151 BUCKINGHAM AVE REDWOOD CITY, CA 94063	NONE	501(C)(3)	CHARITY	25,000
Total ▶ 3a				2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
STANFORD JAZZ WORKSHOP STANFORD JAZZ WORKSHOP 450 SERRA MALL 450 SERRA MALL STANFORD, CA 94305	NONE	501(C)(3)	CHARITY	5,000
STANFORD WOMEN'S CANCER CENTER STANFORD WOMEN'S CANCER CENTER 900 BLAKE WILBUR DR 900 BLAKE WILBUR DR PALO ALTO, CA 94304	NONE	501(C)(3)	CHARITY	10,000
STREET LIFE MINISTRIES STREET LIFE MINISTRIES 901 MADISON AVE 901 MADISON AVE REDWOOD CITY, CA 94061	NONE	501(C)(3)	CHARITY	1,000
Total ► 3a				2,312,215

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE LIVING DESERT THE LIVING DESERT 47900 PORTOLA AVE 47900 PORTOLA AVE PALM DESERT, CA 92260	NONE	501(C)(3)	CHARITY	285,580
TOWER FOUNDATION TOWER FOUNDATION 1 WAHSINGTON SQUARE 1 WASHINGTON SQUARE SAN JOSE, CA 95192	NONE	501(C)(3)	CHARITY	25,000
VISTA CENTER - BLIND & VISUALLY IMP VISTA CENTER - BLIND & VISUALLY IMPAIRED 2470 EL CAMINO REAL 2470 EL CAMINO REAL PALO ALTO, CA 94306	NONE	501(C)(3)	CHARITY	2,000
Total ▶ 3a				2,312,215

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WILDLIFE ASSOCIATES WILDLIFE ASSOCIATESPO BOX 3098 PO BOX 3098 HALF MOON BAY, CA 94019	NONE	501(C)(3)	CHARITY	45,000
Total  3a				2,312,215

TY 2017 Accounting Fees Schedule**Name:** CONNIE AND BOB LURIE FOUNDATION INC**EIN:** 20-8004479**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOUNDATION ADMINISTRATION	7,913	2,121		5,792

TY 2017 Investments Corporate Bonds Schedule**Name:** CONNIE AND BOB LURIE FOUNDATION INC**EIN:** 20-8004479**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PUBLICLY TRATED CORPORATE BONDS	905,448	900,022
ACCRUED INTEREST (BONDS)	34,620	

TY 2017 Investments Corporate Stock Schedule**Name:** CONNIE AND BOB LURIE FOUNDATION INC**EIN:** 20-8004479

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PUBLICLY TRATED SECURITIES (STOCK)	16,188,498	22,162,529

TY 2017 Investments - Other Schedule**Name:** CONNIE AND BOB LURIE FOUNDATION INC**EIN:** 20-8004479**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS	AT COST	700,565	695,072
CDS & BAS	AT COST	4,563,652	4,535,873
LONG TERM DEBTS	AT COST	1,000,000	1,000,000

TY 2017 Other Decreases Schedule

Name: CONNIE AND BOB LURIE FOUNDATION INC

EIN: 20-8004479

Description	Amount
BOOK/TAX GAIN ADJUSTMENT	1,228,465

TY 2017 Other Expenses Schedule**Name:** CONNIE AND BOB LURIE FOUNDATION INC**EIN:** 20-8004479**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
POSTAGE	112			112
BANK CHARGES	42	42		

TY 2017 Other Professional Fees Schedule**Name:** CONNIE AND BOB LURIE FOUNDATION INC**EIN:** 20-8004479

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	154,358	154,358		

TY 2017 Taxes Schedule**Name:** CONNIE AND BOB LURIE FOUNDATION INC**EIN:** 20-8004479

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
IRS EXCISE TAX	10,000			
DE - FILING FEE	207			207

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990	OMB No 1545-0047 2017
	Name of the organization CONNIE AND BOB LURIE FOUNDATION INC	Employer identification number 20-8004479

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

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

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

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

Name of organization CONNIE AND BOB LURIE FOUNDATION INC	Employer identification number 20-8004479
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Part I **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CONNIE L ROBERT A LURIE PO BOX 610043 REDWOOD CITY, CA 940610043	\$ 2,709,143	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization CONNIE AND BOB LURIE FOUNDATION INC	Employer identification number 20-8004479
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Part II **Noncash Property** (See instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	SHARES OF PUBLICLY TRADED COMPANIES	\$ 1,369,143	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	

Name of organization CONNIE AND BOB LURIE FOUNDATION INC	Employer identification number 20-8004479
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	