

Form **990-PF**
 Department of the Treasury
 Internal Revenue Service

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

▶ **Do not enter social security numbers on this form as it may be made public.**
 ▶ **Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.**

OMB No 1545-0052
2017
Open to Public Inspection

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

Name of foundation SOCIUS FOUNDATION		A Employer identification number 46-3951294
Number and street (or P O box number if mail is not delivered to street address) 301 HOWARD STREET STE 1030	Room/suite	B Telephone number (see instructions) (415) 456-4000
City or town, state or province, country, and ZIP or foreign postal code SAN FRANCISCO, CA 94105		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 266,944	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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 <input type="checkbox"/>

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)	172,593			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	61,183				
12 Total. Add lines 1 through 11	233,776		0		
Operating and Administrative Expenses	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)	1,275			
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	2,274			
	24 Total operating and administrative expenses. Add lines 13 through 23	3,549		0	
	25 Contributions, gifts, grants paid	235,174			235,174
26 Total expenses and disbursements. Add lines 24 and 25	238,723		0	235,174	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-4,947				
b Net investment income (if negative, enter -0-)			0		
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	159,480	265,944	265,944
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ <u>1,000</u>			
	Less allowance for doubtful accounts ▶ _____	10,000	1,000	1,000
	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)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____			
Less accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)				
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)	169,480	266,944	266,944	
Liabilities	17 Accounts payable and accrued expenses	130,035	232,446	
	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)	130,035	232,446	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	39,445	34,498	
	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)	39,445	34,498		
31 Total liabilities and net assets/fund balances (see instructions) .	169,480	266,944		

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	39,445
2 Enter amount from Part I, line 27a	2	-4,947
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	34,498
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	34,498

Part IV Capital Gains and Losses for Tax on Investment Income

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

(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			
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			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	
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	131,100	5,437	24 112562
2015	124,000	22,572	5 493532
2014	2,500	513	4 873294
2013			
2012			

2 Total of line 1, column (d)	2	34 479388
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	11 493129
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	29,550
5 Multiply line 4 by line 3	5	339,622
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	339,622
8 Enter qualifying distributions from Part XII, line 4	8	235,174

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)

Table with 11 rows for excise tax calculations. Includes sections 1a through 11, with sub-sections 6a-6d. Columns for line numbers and amounts.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes sections 1a through 10. Columns for question numbers and Yes/No responses.

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 HTTP //WWW.SOCIUSFOUNDATION.ORG 13 Yes
14 The books are in care of DAN SEBASTIANI Telephone no (925) 295-2512

Located at 1350 CARLBAC AVENUE STE 350 WALNUT CREEK CA ZIP+4 94596

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here 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)
(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 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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? If "Yes," list the years 20, 20, 20, 20 Yes No
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement-see instructions). 2b
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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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.			<input type="checkbox"/>
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?	<input type="checkbox"/> Yes	<input type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870</i>			6b
				No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			7b

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

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

(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	(e) Expense account, 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	(e) Expense account, 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
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	
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	0
b	Average of monthly cash balances.	1b	30,000
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	30,000
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	30,000
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	450
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	29,550
6	Minimum investment return. Enter 5% of line 5.	6	1,478

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	1,478
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,478
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,478
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	1,478

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	235,174
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	235,174
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	235,174

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				1,478
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.				
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.			2,474	
d From 2015.			122,871	
e From 2016.			130,828	
f Total of lines 3a through e.	256,173			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ _____ 235,174				
a Applied to 2016, 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).				
d Applied to 2017 distributable amount.				1,478
e Remaining amount distributed out of corpus	233,696			
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	489,869			
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	489,869			
10 Analysis of line 9				
a Excess from 2013.				
b Excess from 2014.			2,474	
c Excess from 2015.			122,871	
d Excess from 2016.			130,828	
e Excess from 2017.			233,696	

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)

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) 2017	(b) 2016	(c) 2015	(d) 2014	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

PATRICK E HANLEY
2929 CLAY STREET
SAN FRANCISCO, CA 94115
(415) 456-4000
PHANLEY@SOCIOUSFOUNDATION.ORG

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

ELECTRONICALLY, CONTACT DIRECTOR

c Any submission deadlines

VARIOUS

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

2500-9999

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 Additional Data Table				
Total ▶ 3a				235,174
b <i>Approved for future payment</i>				
Total ▶ 3b				

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
PATRICK E HANLEY SR 301 HOWARD STREET STE1030 SAN FRANCISCO, CA 94105	PRESIDENT 1 00	0	0	0
F MICHAEL HEFFERNAN 1350 CARLBACK AVENUE WALNUT CREEK, CA 94596	DIRECTOR 1 00	0	0	0
GREG BUONOCORE 301 HOWARD STREET STE1030 SAN FRANCISCO, CA 94105	DIRECTOR 000 00	0	0	0
STEVE DYSON 301 HOWARD STREET STE1030 SAN FRANCISCO, CA 94105	DIRECTOR 000 00	0	0	0
SCOTT CULLER 301 HOWARD STREET STE1030 SAN FRANCISCO, CA 94105	DIRECTOR 000 00	0	0	0

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ABILITIES UNITED 525 E CHARLESTON RD PALO ALTO, CA 94306	NC	1	2017 GRANTS	6,000
ABODE SERVICES40849 FREMONT BLVD FREMONT, CA 94538	NC	1	2017 GRANTS	6,000
ACCESSED FOUNDATION 2436 SACRAMENTO ST 100 BERKELEY, CA 94702	NC	1	2017 GRANTS	5,000
ALPHA PREGNANCY CENTER 5070 MISSION STREET SAN FRANCISCO, CA 94112	NC	1	MATCHING DONATION-CHARLES GARCIA	100
BIG BROTHERS BIG SISTERS OF AMERICA 711 S DALE MABRY HWY SU TAMPA, FL 33609	NC	1	2017 GRANTS	6,000
Total ▶ 3a				235,174

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>				
BOSS1918 UNIVERSITY AVE SUIT BERKELEY, CA 94704	NC	1	2017 GRANTS	6,000
BOYS & GIRLS CLUBS OF BROWARD COUNT 877 NW 61ST STREET FORT LAUDERDALE, FL 33309	NC	1	2017 GRANTS	6,000
CATHOLIC CHARITIES OF VENICE 1000 PINEBROOK RD VENICE, FL 34285	NC	1	2017 GRANTS	4,000
CLOTHES TO KIDS 1059 NORTH HERCULES AVENU CLEARWATER, FL 33765	NC	1	2017 GRANTS	6,000
COALITION FOR THE HOMELESS OF CENTR 639 W CENTRAL BLVD ORLANDO, FL 32801	NC	1	2017 GRANTS	6,000
Total 3a				235,174

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>				
COASTAL CONSERVATION ASSOCIATION C PO BOX 568886 ORLANDO, FL 32856	NC	1	2017 GRANTS	6,000
COMMUNITY FOOD BANK OF CENTRAL ALAB 107 WALTER DAVIS DRIVE BIRMINGHAM, AL 35209	NC	1	2017 GRANTS	6,000
CURE BOWL36 WEST PINE STREET ORLANDO, FL 32801	NC	1	2017 GRANTS	6,000
EAGLE CREEK ELEMENTARY SCHOOL 10025 EAGLE CREEK SANCTUA ORLANDO, FL 32832	NC	1	DONATION-CYNTHIA ZIMMERMAN/TEACHING	100
EAGLE CREEK FUN RUN 10025 EAGLE CREEK SANCTUA ORLANDO, FL 32832	NC	1	MATCHING-CYNTHIA ZIMMERMAN	30
Total ► 3a				235,174

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>				
EPIES WELLNESS FOUNDATION 735 UNIVERSITY AVE SACRAMENTO, CA 95825	NC	1	2017 GRANTS	3,000
EVANS SCHOLARS FOUNDATION ONE BRIAR RD GOLF, IL 60029	NC	1	MATCHING DONATION-HANK STICKLEY	250
FIRST CHAPTERPO BOX 3952 OAKLAND, CA 94609	NC	1	2017 GRANTS	5,000
FLORIDA RESURRECTION HOUSE INC 800 ELEVENTH ST NORTH ST PETERSBURG, FL 33705	NC	1	2017 GRANTS	6,000
FRIENDS OF ISRAELPO BOX 908 BELLMAWR, NJ 08099	NC	1	MATCHING DONATION-CHARLES GARCIA	100
Total ▶ 3a				235,174

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>				
GATEWAY COMMUNITY SERVICES INC 555 STOCKTON STREET JACKSONVILLE, FL 32204	NC	1	2017 GRANTS	6,000
GLOBAL GENES-DENIM DASH 28 ARGONAUT SUITE 150 ALISO VIEJO, CA 92656	NC	1	MATCHING-CYNTHIA ZIMMERMAN	30
GULF COAST JEWISH FAMILY AND COMMUN 14041 ICOT BLVD CLEARWATER, FL 33760	NC	1	2017 GRANTS	6,000
HABITAT FOR HUMANITY 3800 NW 22ND AVE MIAMI, FL 33142	NC	1	2017 GRANTS	6,000
HALLECK CREEK RANCHPO BOX 159 NICASIO, CA 94946	NC	1	2017 GRANTS	6,000
Total ▶ 3a				235,174

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>				
HOMELESS SERVICES CENTER OF SANTA C PO BOX 1319 SANTA CRUZ, CA 95061	NC	1	2017 GRANTS	7,000
HOSPITALITY HOUSE OF CHARLOTTE 1400 SCOTT AVE CHARLOTTE, NC 28202	NC	1	2017 GRANTS	6,000
JDRF (JUVENILE DIABETES RESEARCH FO 3411 NW 9TH AVE 701 FORT LAUDERDALE, FL 33309	NC	1	2017 GRANTS	6,000
LAKE COUNTY HAVENPO BOX 127 LIBERTYVILLE, IL 60048	NC	1	2017 GRANTS	6,000
MADISON PTA2200 MACKAY LANE REDONDO BEACH, CA 90278	NC	1	102 50 TO AMAYA & 102 50 TO KAYDEN	205
Total ▶				235,174
3a				

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>				
MIAMI COUNTRY DAY SCHOOL 601 NE 107TH STREET MIAMI, FL 33161	NC	1	2017 GRANTS	6,000
NATIONAL PEDIATRIC CANCER FOUNDATIO 5550 EXECUTIVE DR TAMPA, FL 33609	NC	1	2017 GRANTS	6,909
PAJARO VALLEY LOAVES AND FISHES 150 2ND STREET WATSONVILLE, CA 95076	NC	1	2017 GRANTS	6,000
PARC3190 TYRONE BLVD NORTH ST PETERSBURG, FL 33710	NC	1	2017 GRANTS	6,000
PROJECT HOMELESS CONNECT 25 VAN NESS AVE SUITE 34 SAN FRANCISCO, CA 94102	NC	1	2017 GRANTS	6,000
Total ▶ 3a				235,174

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>				
RBC MARIA RELIEF CALLE 9 NUEVA FINAL RINCON, PR 00677	NC	1	2017 GRANTS	3,000
RUTHERFORD INSTITUTE PO BOX 7482 CHARLOTTESVILLE, VA 22906	NC	1	MATCHING DONATION-CHARLES GARCIA	50
SHELTER INC PO BOX 5368 CONCORD, CA 94524	NC	1	2017 GRANTS	6,000
SHEPHERDS HOPE INC 4851 S APOPKA-VINELAND R ORLANDO, FL 32819	NC	1	2017 GRANTS	6,000
SOCIETY OF ST VINCENT DE PAUL 384 15TH ST N ST PETERSBURG, FL 33705	NC	1	2017 GRANTS	3,000
Total ▶				235,174
3a				

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>				
SPARK101A CLAY ST 188 SAN FRANCISCO, CA 94111	NC	1	2017 GRANTS	3,000
STAND UP TO CANCERPO BOX 843721 LOS ANGELES, CA 90084	NC	1	MATCHING DONATION-CYNTHIA ZIMMERMAN	50
STEPHEN FOSTER ELEMENTARY SCHOOL 3471 SW 22ND STREET FORT LAUDERDALE, FL 33312	NC	1	MATCHING DONATION-CYNTHIA ZIMMERMAN	25
STERNE SCHOOL838 KEARNY ST SAN FRANCISCO, CA 94108	NC	1	2017 GRANTS	6,000
THE DG FOUNDATION 296 MARGARITA DRIVE SAN RAFAEL, CA 94901	NC	1	STRONG SPONSORSHIP	2,500
Total 3a				235,174

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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 GUARDSMEN 1016 LINCOLN BLVD SUITE SAN FRANCISCO, CA 94129	NC	1	2017 GRANTS	6,000
THE LEUKEMIA & LYMPHOMA SOCIETY 221 MAIN STREET SUITE 165 SAN FRANCISCO, CA 94105	NC	1	DONATION-ARTAVIA CLAY	50
THE LEUKEMIA & LYMPHOMA SOCIETY 221 MAIN STREET SUITE 165 SAN FRANCISCO, CA 94105	NC	1	DONATION-CASEY BIVENS	50
THE LEUKEMIA & LYMPHOMA SOCIETY 221 MAIN STREET SUITE 165 SAN FRANCISCO, CA 94105	NC	1	DONATION-CHRISTINA BELTRAN	50
THE LEUKEMIA & LYMPHOMA SOCIETY 221 MAIN STREET SUITE 165 SAN FRANCISCO, CA 94105	NC	1	DONATION-CYNTHIA ZIMMERMAN	100
Total ▶ 3a				235,174

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 LEUKEMIA & LYMPHOMA SOCIETY 221 MAIN STREET SUITE 165 SAN FRANCISCO, CA 94105	NC	1	DONATION-DANA HARTWELL	50
THE LEUKEMIA & LYMPHOMA SOCIETY 221 MAIN STREET SUITE 165 SAN FRANCISCO, CA 94105	NC	1	DONATION-GENA DEBARTOLO	50
THE LEUKEMIA & LYMPHOMA SOCIETY 221 MAIN STREET SUITE 165 SAN FRANCISCO, CA 94105	NC	1	DONATION-MATT DROSS	25
THE LEUKEMIA & LYMPHOMA SOCIETY 221 MAIN STREET SUITE 165 SAN FRANCISCO, CA 94105	NC	1	DONATION-MELISSA KOZERA	100
THE MARSHALL PROJECT 156 W 56TH ST SUITE 70 NEW YORK, NY 10019	NC	1	MATCHING DONATION-MICHAEL HOY	125
Total ▶ 3a				235,174

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 MAVEN PROJECT 3838 CALIFORNIA STREET S SAN FRANCISCO, CA 94118	NC	1	2017 GRANTS	5,000
THE PAYTON WRIGHT FOUNDATION PO BOX 110067 BRADENTON, FL 34211	NC	1	2017 GRANTS	6,000
THE REFUGE OF CLEARWATER INC 606 ALDEN AVE CLEARWATER, FL 33755	NC	1	2017 GRANTS	6,000
THE ROCK CHURCH 273 MONTE VISTA RD CANDLER, NC 28715	NC	1	INTERNSHIP PROGRAM FOR TAYLOR COE	100
THE RUSSELL HOME FOR ATYPICAL CHILD 510 HOLDEN AVENUE ORLANDO, FL 32839	NC	1	2017 GRANTS	6,000
Total 3a				235,174

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>				
TRINITY UNIVERSITY ONE TRINITY PLACE SAN ANTONIO, TX 78212	NC	1	2017 GRANTS	6,000
UNITED CEREBRAL PALSY (UCP) OF CENT 3305 S ORANGE AVENUE ORLANDO, FL 32806	NC	1	2017 GRANTS	6,000
YOUTH CHALLENGE800 SHARON DRIVE WESTLAKE, OH 44145	NC	1	MATCHING DONATION-MICHAEL HOY	125
Total 3a				235,174

TY 2017 Accounting Fees Schedule**Name:** SOCIUS FOUNDATION**EIN:** 46-3951294**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	1,275			

TY 2017 Other Expenses Schedule**Name:** SOCIUS FOUNDATION**EIN:** 46-3951294**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
BANK FEES	1,124			
OTHER TAXES AND FEES	60			
OFFICE EXPENSE	1,090			

TY 2017 Other Income Schedule**Name:** SOCIUS FOUNDATION**EIN:** 46-3951294**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FUNDRAISING ACTIVITIES NET	61,183		

**TY 2017 Substantial Contributors
Schedule****Name:** SOCIUS FOUNDATION**EIN:** 46-3951294

Name	Address
PATRICK HANLEY	2929 CLAY STREET SAN FRANCISCO, CA 94115
HEFFERNAN FOUNDATION	1350 CARLBACK AVENUE WALNUT CREEK, CA 94596
GREG MILLER	1640 DAYTONIA ROAD MIAMI BEACH, FL 33141
PAUL LEFCOURT	393 HERMOSA COURT LAFAYETTE, CA 94549
ERIC SHAPIRO	4522 S FERNCROFT CIRCLE TAMPA, FL 33629
KEVIN KERSHISNIK	630 W 6TH ST 104 LOS ANGELES, CA 90017

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
SOCIUS FOUNDATION

Employer identification number
46-3951294

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 SOCIUS FOUNDATION	Employer identification number 46-3951294
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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	HEFFERNAN FOUNDATION 1350 CARLBACK AVE WALNUT CREEK, CA94596	\$ 130,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
2	PAUL LEFCOURT 393 HERMOSA COURT LAFAYETTE, CA94549	\$ 5,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
3	PATRICK E HANLEY 2929 CLAY STREET SAN FRANCISCO, CA941151712	\$ 12,500	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
4	GREG MILLER 1640 DAYTONIA ROAD MIAMI BEACH, FL33141	\$ 10,000	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
5	ERIC M SHAPIRO 4522 S FERNCROFT CIRCLE TAMPA, FL33629	\$ 6,100	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
6	KEVIN M KERSHISNIK 630 W 6TH STREET 104 LOS ANGELES, CA90017	\$ 5,156	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization SOCIUS FOUNDATION	Employer identification number 46-3951294
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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
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____

Name of organization SOCIUS FOUNDATION	Employer identification number 46-3951294
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____
 Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____