

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.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information

OMB No. 1545-0052

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning 11/01, 2017, and ending 10/31, 2018

THE DAVIDSON FAMILY FOUNDATION
255 W. JULIAN STREET #200
SAN JOSE, CA 95110-2406

A Employer identification number
77-0325599

B Telephone number (see instructions)
(408) 491-7733

C If exemption application is pending, check here ☐

D 1 Foreign organizations, check here ☐

2 Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

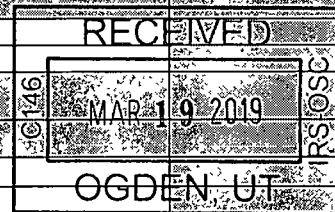
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization ☒ Section 501(c)(3) exempt private foundation **04**
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16)
\$ 39,575,262.
J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis)

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)	14,263,517.			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	31,648.	31,648.		
	4 Dividends and interest from securities	491,460.	491,460.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	440,569.			
	b Gross sales price for all assets on line 6a 3,043,300.				
	7 Capital gain net income (from Part IV, line 2)		440,569.		
	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)	SEE STATEMENT 1	4,013.	4,013.		
12 Total. Add lines 1 through 11		15,231,207.	967,690.	0.	
ADMINISTRATIVE AND OPERATING EXPENSES	13 Compensation of officers, directors, trustees, etc.	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch) SEE ST 2	49,500.	49,500.		
	c Other professional fees (attach sch) SEE ST 3	105,722.	105,722.		
	17 Interest				
	18 Taxes (attach schedule) (see instrs) SEE STM 4	52,600.			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses (attach schedule)	SEE STATEMENT 5	4,274.	4,274.		
24 Total operating and administrative expenses. Add lines 13 through 23		212,096.	159,496.		
25 Contributions, gifts, grants paid PART XV		1,764,500.			1,764,500.
26 Total expenses and disbursements. Add lines 24 and 25		1,976,596.	159,496.	0.	1,764,500.
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements		13,254,611.			
b Net investment income (if negative, enter -0-)			808,194.		
c Adjusted net income (if negative, enter -0-)				0.	

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
A S S E T S	1 Cash — non-interest-bearing			
	2 Savings and temporary cash investments	4,828,703.	1,686,609.	1,686,609.
	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 sch) ▶			
	Less allowance for doubtful accounts ▶	36,982.		
	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)	22,066,625.	37,888,653.	37,888,653.
	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.)	26,932,310.	39,575,262.	39,575,262.	
L I A B I L I T I E S	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
N E T A S S E T S O R F U N D B A L A N C E S	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ☒			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	26,932,310.	39,575,262.	
	30 Total net assets or fund balances (see instructions)	26,932,310.	39,575,262.	
	31 Total liabilities and net assets/fund balances (see instructions)	26,932,310.	39,575,262.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	26,932,310.
2 Enter amount from Part I, line 27a	2	13,254,611.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	40,186,921.
5 Decreases not included in line 2 (itemize) ▶ <u>SEE STATEMENT 6</u>	5	611,659.
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	39,575,262.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PUBLICLY TRADED SECURITIES				
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 3,043,300.		2,602,731.	440,569.
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			440,569.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	440,569.
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	0.

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.)

N/A

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 doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see the 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			
2015			
2014			
2013			
2012			

2 Total of line 1, column (d)	2	
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years	3	
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4	8	

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)

1 a 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	16,164.
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	0.
3 Add lines 1 and 2		3	16,164.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	16,164.
6 Credits/Payments			
a 2017 estimated tax pmts and 2016 overpayment credited to 2017	6 a	52,329.	
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c		
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7	52,329.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	36,165.	
11 Enter the amount of line 10 to be Credited to 2018 estimated tax	11	36,165.	Refunded

Part VII Statements Regarding Activities

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		X
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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions. CA		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation	X	
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 tax year beginning in 2017? See the instructions for Part XIV. If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
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	X
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	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X
14 The books are in care of <u>GLORIA K. CHIANG</u> Telephone no <u></u> Located at <u>255 W. JULIAN STREET, STE 200 SAN JOSE CA</u> ZIP + 4 <u>95110-2406</u>		
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 <u>N/A</u>	15	N/A
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 the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country <u></u>	16	X

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

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

	Yes	No
1 a 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 <u></u>	1 b	N/A
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?	1 c	X
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 <u>20__ , 20__ , 20__ , 20__</u>	☐ 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)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__ , 20__ , 20__ , 20__</u>		
3 a 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)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
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?	4 b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5 a** 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

5 b N/A

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?N/A ☐ Yes ☐ No

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

6 a 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?

6 b X

If 'Yes' to 6b, file Form 8870

7 a 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?

N/A

7 b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
GLORIA K CHIANG 255 W. JULIAN STREET, STE 200 SAN JOSE, CA 95110-2406	PRESIDENT 1.00	0.	0.	0.
SANDRA DAVIDSON 1429 DRY CREEK ROAD SAN JOSE, CA 95125	VICE PRESIDE 0.25	0.	0.	0.
KATHRYN A. JACKSON 255 W. JULIAN STREET, STE 200 SAN JOSE, CA 95110-2406	SECRETARY 1.00	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	(b) Title, and average hours per week 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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. See instructions. If none, enter 'NONE.'

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

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 N/A	
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	0.

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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	1 a	36,762,751.
b	Average of monthly cash balances	1 b	106,993.
c	Fair market value of all other assets (see instructions)	1 c	11,789.
d	Total (add lines 1a, b, and c)	1 d	36,881,533.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	36,881,533.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	553,223.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	36,328,310.
6	Minimum investment return. Enter 5% of line 5	6	1,816,416.

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	1,816,416.
2 a	Tax on investment income for 2017 from Part VI, line 5	2 a	16,164.
b	Income tax for 2017 (This does not include the tax from Part VI)	2 b	
c	Add lines 2a and 2b	2 c	16,164.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,800,252.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	1,800,252.
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	1,800,252.

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	1 a	1,764,500.
b	Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,764,500.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,764,500.

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				1,800,252.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			0.	
b Total for prior years 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2017				
a From 2012				
b From 2013				
c From 2014				
d From 2015	79,850.			
e From 2016				
f Total of lines 3a through e	79,850.			
4 Qualifying distributions for 2017 from Part XII, line 4. $\blacktriangleright$ \$ 1,764,500.				
a Applied to 2016, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2017 distributable amount				1,764,500.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	35,752.			35,752.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	44,098.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
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		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
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)	0.			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	44,098.			
10 Analysis of line 9				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015	44,098.			
d Excess from 2016				
e Excess from 2017				

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

N/A

- 1 a** 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 foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☒ 4942(j)(5)

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 Paid during the year SEE STATEMENT 7				
Total			3 a	1,764,500.
b Approved for future payment				
Total			3 b	

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

Form 990-PF (2017)

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?

a Transfers from the reporting foundation to a noncharitable exempt organization of

(1) Cash

(2) Other assets

b Other transactions

(1) Sales of assets to a noncharitable exempt organization

(2) Purchases of assets from a noncharitable exempt organization

(3) Rental of facilities, equipment, or other assets

(4) Reimbursement arrangements

(5) Loans or loan guarantees

(6) Performance of services or membership or fundraising solicitations

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

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

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If 'Yes,' complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**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.

Signature of officer or trustee

Date _____

Title

Print/Type preparer's name

Preparer's signature

Date _____

KENNETH M. KAWAMOTO

KENNETH M. KAWAMOTO

2/27/14

Check

Life

PTIN	
------	--

P00021001

Firm's name ▶ KAWAMOTO, WEIL & COMPANY

Firm's EIN ▶ 77-0237214

Firm's address ▶ 150 E. CAMPBELL AVE, #201

Phone no (408) 379-7300

CAMPBELL, CA 95008

BAA

Form 990-PF (2017)

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

- **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
► **Go to www.irs.gov/Form990 for the latest information.**

OMB No 1545-0047

2017

Name of the organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 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 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 33-1/3% 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ANITA A. DAVIDSON CLAT 255 W. JULIAN STREET, STE 200 SAN JOSE, CA 95110	\$ 5,625,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
2	AVEX 2009 CLAT 255 W. JULIAN STREET, STE 200 SAN JOSE, CA 95110	\$ 5,625,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
3	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 10,233.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
4	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 12,447.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
5	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 48,640.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
6	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 14,805.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 25,930.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
8	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 37,101.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
9	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 23,680.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
10	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 48,360.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
11	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 36,274.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
12	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 52,875.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
13	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 9,778.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
14	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 12,912.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
15	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 48,130.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
16	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 14,780.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
17	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 25,280.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
18	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 35,850.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
19	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 23,570.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
20	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 46,328.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
21	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 34,919.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
22	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 48,325.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
23	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 19,660.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
24	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 26,695.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
25	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 39,815.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
26	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 34,617.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
27	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 34,520.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
28	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 23,774.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
29	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 14,045.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
30	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 37,701.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
31	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 37,400.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
32	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 22,244.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
33	ANITA A. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 52,350.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
34	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 10,233.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
35	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 12,447.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
36	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 48,640.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
37	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 14,805.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
38	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 51,860.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
39	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 23,680.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
40	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 37,110.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
41	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 52,160.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
42	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 128,606.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
43	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 48,360.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
44	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 52,875.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
45	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 169,230.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
46	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 9,778.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
47	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 12,912.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
48	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 48,130.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
49	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 14,780.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
50	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 50,560.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
51	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 23,570.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
52	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 35,850.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
53	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 51,060.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
54	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 123,804.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
55	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 46,328.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
56	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 48,325.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
57	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 161,220.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
58	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 19,660.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
59	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 26,695.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
60	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 39,815.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
61	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 31,017.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
62	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 107,305.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
63	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 57,695.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
64	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 34,520.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
65	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 27,066.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
66	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 14,045.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
67	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 50,268.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
68	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 37,400.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
69	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 55,610.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
70	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 52,350.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
71	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 22,660.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
72	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 28,120.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
73	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 60,950.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
74	CHARLES W. DAVIDSON 1543 PEREGRINO WAY SAN JOSE, CA 95125	\$ 114,340.	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

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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
3	250 SH BP	\$ 10,233.	11/01/17
4	250 SH CALATLANTIC	\$ 12,447.	11/01/17
5	615 SH COMERICA	\$ 48,640.	11/01/17
6	500 SH CENTERPOINT	\$ 14,805.	11/01/17
7	500 SH CONOCOPHILLIPS	\$ 25,930.	11/01/17
8	3000 SH FORD MOTOR COMPANY	\$ 37,101.	11/01/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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
9	500 SH CAMPBELL SOUP	\$ 23,680.	11/01/17
10	750 SH SCHLUMBERGER	\$ 48,360.	11/01/17
11	165 SH SVB FINANCIAL	\$ 36,274.	11/01/17
12	2500 SM ENERGY	\$ 52,875.	11/01/17
13	250 SH BP	\$ 9,778.	11/15/17
14	250 SH CALATLANTIC	\$ 12,912.	11/15/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

Employer identification number

77-0325599

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
15	615 SH COMERICA	\$ 48,130.	11/15/17
16	500 SH CENTERPOINT	\$ 14,780.	11/15/17
17	500 SH CONOCOPHILLIPS	\$ 25,280.	11/15/17
18	3000 SH FORD MOTOR COMPANY	\$ 35,850.	11/15/17
19	500 SH CAMPBELL SOUP	\$ 23,570.	11/15/17
20	750 SH SCHLUMBERGER	\$ 46,328.	11/15/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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
21	165 SH SVB FINANCIAL	\$ 34,919.	11/15/17
22	2500 SH SM ENERGY	\$ 48,325.	11/15/17
23	500 SH BP	\$ 19,660.	11/21/17
24	500 SH CALATLANTIC	\$ 26,695.	11/21/17
25	500 SH COMERICA	\$ 39,815.	11/21/17
26	300 SH CHEVRON	\$ 34,617.	11/21/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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
27	1000 SH AT&T INC	\$ 34,520.	11/21/17
28	431 SH WESTERN ALLIANCE BANCORP	\$ 23,774.	11/21/17
29	500 SH CENTERPONT ENERGY, INC	\$ 14,045.	12/27/17
30	300 SH CHEVRON	\$ 37,701.	12/27/17
31	500 SH CITIGROUP INC NEW	\$ 37,400.	12/27/17
32	400 SH CONOCOPHILLIPS	\$ 22,244.	12/27/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

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77-0325599

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
33	1000 SH MORGAN STANLEY	\$ 52,350.	12/27/17
34	250 SH BP	\$ 10,233.	11/01/17
35	250 SH CALATLANTIC	\$ 12,447.	11/01/17
36	615 SH COMERICA	\$ 48,640.	11/01/17
37	500 SH CENTERPOINT	\$ 14,805.	11/01/17
38	1000 SH CONOCOPHILLIPS	\$ 51,860.	11/01/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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
39	500 SH CAMPBELL SOUP	\$ 23,680.	11/01/17
40	3000 SH FORD MOTOR COMPANY	\$ 37,110.	11/01/17
41	500 SH PHILIP MORRIS INTL INC	\$ 52,160.	11/01/17
42	585 SH SVB FINANCIAL	\$ 128,606.	11/01/17
43	750 SH SCHLUMBERGER	\$ 48,360.	11/01/17
44	2500 SH SM ENERGY	\$ 52,875.	11/01/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

Part III 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
45	3000 SH WESTERN ALLIANCE BANCORP	\$ 169,230.	11/01/17
46	250 SH BP	\$ 9,778.	11/15/17
47	250 SH CALATLANTIC	\$ 12,912.	11/15/17
48	615 SH COMERICA	\$ 48,130.	11/15/17
49	500 SH CENTERPOINT	\$ 14,780.	11/15/17
50	1000 SH CONOCOPHILLIPS	\$ 50,560.	11/15/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

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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
51	500 SH CAMPBELL SOUP	\$ 23,570.	11/15/17
52	3000 SH FORD MOTOR COMPANY	\$ 35,850.	11/15/17
53	500 SH PHILIP MORRIS INTL INC	\$ 51,060.	11/15/17
54	585 SH SVB FINANCIAL	\$ 123,804.	11/15/17
55	750 SH SCHLUMBERGER	\$ 46,328.	11/15/17
56	2500 SH SM ENERGY	\$ 48,325.	11/15/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

THE DAVIDSON FAMILY FOUNDATION

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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
57	3000 SH WESTERN ALLIANCE BANCORP		
		\$ 161,220.	11/15/17
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
58	500 SH BP		
		\$ 19,660.	11/21/17
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
59	500 SH CALATLANTIC		
		\$ 26,695.	11/21/17
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
60	500 SH COMERICA		
		\$ 39,815.	11/21/17
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
61	300 SH PHILIP MORRIS INTL INC		
		\$ 31,017.	11/21/17
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
62	500 SH SVB FINANCIAL		
		\$ 107,305.	11/21/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

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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
63	500 SH CHEVRON	\$ 57,695.	11/21/17
64	1000 SH AT&T INC	\$ 34,520.	11/21/17
65	150 SH FACEBOOK INC	\$ 27,066.	11/21/17
66	500 SH CENTERPOINT ENERGY INC	\$ 14,045.	12/27/17
67	400 SH CHEVRON CORP	\$ 50,268.	12/27/17
68	500 SH CITIGROUP INC NEW	\$ 37,400.	12/27/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

THE DAVIDSON FAMILY FOUNDATION

77-0325599

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
69	1000 SH CONOCOPHILLIPS	\$ 55,610.	12/27/17
70	1000 SH MORGAN STANLEY	\$ 52,350.	12/27/17
71	2000 SH SAFEGUARD SCIENTIFICS INC NEW	\$ 22,660.	12/27/17
72	1000 SH SONIC CORP	\$ 28,120.	12/27/17
73	1000 SH WELLS FARGO & CO NEW	\$ 60,950.	12/27/17
74	2000 SH WESTERN ALLIANCE BANCORP	\$ 114,340.	12/27/17

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Employer identification number

77-0325599

► \$ N/A

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	N/A		
	(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

THE DAVIDSON FAMILY FOUNDATION

77-0325599

STATEMENT 1
FORM 990-PF, PART I, LINE 11
OTHER INCOME

	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
CAPITAL GAIN DISTRIBUTION	\$ 1,799.	\$ 1,799.	
OTHER INVESTMENT INCOME	2,214.	2,214.	
TOTAL	\$ 4,013.	\$ 4,013.	\$ 0.

STATEMENT 2
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING/CLERICAL SERVICES	\$ 35,000.	\$ 35,000.		
CPA ACCOUNTING FEES	14,500.	14,500.		
TOTAL	\$ 49,500.	\$ 49,500.	\$ 0.	\$ 0.

STATEMENT 3
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT - BROKER FEES	\$ 95,942.	\$ 95,942.		
OUTSIDE CONTRACTORS	9,780.	9,780.		
TOTAL	\$ 105,722.	\$ 105,722.	\$ 0.	\$ 0.

STATEMENT 4
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAXES	\$ 52,600.			
TOTAL	\$ 52,600.	\$ 0.	\$ 0.	\$ 0.

THE DAVIDSON FAMILY FOUNDATION

77-0325599

STATEMENT 5
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK CHARGES	\$ 45.	\$ 45.		
FILING FEES	577.	577.		
INSURANCE	3,652.	3,652.		
TOTAL	\$ 4,274.	\$ 4,274.	\$ 0.	\$ 0.

STATEMENT 6
FORM 990-PF, PART III, LINE 5
OTHER DECREASES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS	
TOTAL	\$ 611,659.

STATEMENT 7
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
YMCA OF SILICON VALLEY 80 SARATOGA AVENUE SANTA CLARA CA 95051	NONE	PC	COMMUNITY SERVICE	\$ 50,000.
HUMANE SOCIETY OF SILICON VALLEY 901 AMES AVE MILPITAS CA 95035	NONE	PC	COMMUNITY SERVICE	10,000.
SILICON VALLEY MONTEREY BOY SCOUTS 970 W. JULIAN STREET SAN JOSE CA 95126	NONE	PC	COMMUNITY SERVICE	25,000.
DOWNTOWN COLLEGE PREP 1400 PARKMOOR AVE #206 SAN JOSE CA 95126	NONE	PC	EDUCATION	25,000.
BOYS AND GIRLS CLUBS 518 VALLEY WAY MILPITAS CA 95035	NONE	PC	COMMUNITY SERVICE	25,000.
SAN JOSE CONSERVATION CORPS 1560 BERGER DR SAN JOSE CA 95112	NONE	PC	EDUCATION	125,000.

THE DAVIDSON FAMILY FOUNDATION

77-0325599

STATEMENT 7 (CONTINUED)
 FORM 990-PF, PART XV, LINE 3A
 RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
AVENAL HISTORICAL SOCIETY 600 FRESNO ST. AVENAL CA 93204	NONE	PC	COMMUNITY SERVICE	\$ 3,500.
KQED, INC. 2601 MARIPOSA ST. SAN FRANCISCO CA 94110	NONE	PC	COMMUNITY SERVICE	2,500.
PETA 554 GRAND AVE OAKLAND CA 94610	NONE	PC	COMMUNITY SERVICE	5,000.
PAWS (PERFORMING ANIMAL WELFARE P.O. BOX 849 GALT CA 95632	NONE	PC	COMMUNITY SERVICE	5,000.
VMC FOUNDATION 2400 MOORPARK AVE 207 SAN JOSE CA 95128	NONE	PC	MEDICAL RESEARCH	10,000.
AMERICAN RED CROSS 431 18TH STREET NVV WASHINGTON D.C. DC 20006	NONE	PC	MEDICAL RESEARCH	1,000.
NEXT DOOR SOLUTIONS TO DOMESTIC VIOLENCE 234 E GISH RD SAN JOSE CA 95112	NONE	PC	COMMUNITY SERVICE	10,000.
VALLEY CHRISTIAN SCHOOL 100 SKYWAY PR #120 SAN JOSE CA 95111	NONE	PC	EDUCATION	44,000.
COMMON SENSE CHILDBIRTH 213 S DILLARD ST #340 WINTER GARDEN FL 34787	NONE	PC	COMMUNITY SERVICE	20,000.
STROKE AWARENESS FOUNDATION 51 E CAMPBELL AVER #106M CAMPBELL CA 95008	NONE	PC	MEDICAL RESEARCH	5,000.
NATIONAL MS SOCIETY 1570 GEORGETTA DR SAN JOSE CA 95125	NONE	PC	MEDICAL RESEARCH	2,500.
WILDLIFE CTR OF SILICON VALLEY 3027 PENITENCIA CREEK RD. SAN JOSE CA 95132	NONE	PC	COMMUNITY SERVICE	5,000.

THE DAVIDSON FAMILY FOUNDATION

77-0325599

STATEMENT 7 (CONTINUED)
 FORM 990-PF, PART XV, LINE 3A
 RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
HOPE SERVICES 30 LAS COLINAS LANE SAN JOSE CA 95119	NONE	PC	COMMUNITY SERVICE	\$ 10,000.
YWCA 375 SO. 3RD. STREET SAN JOSE CA 95112	NONE	PC	BUILDING FUND/COMMUNITY	250,000.
E.OKLAHOMA STATE COLLEGE FOUNDATION 1301 WEST MAIN WILBURTON OK 74578	NONE	PC	EDUCATION	50,000.
SAN JOSE SPORTS AUTHORITY 345 PARK AVENUE SAN JOSE CA 95110	NONE	PC	EDUCATION	25,000.
CALIFORNIA LINE DANCE ASSOC 262 E. GISH ROAD SAN JOSE CA 95112	NONE	PC	COMMUNITY SERVICE	25,000.
TOWN CATS PO BOX 1828 MORGAN HILL CA 95038	NONE	PC	COMMUNITY SERVICE	5,000.
THE HEALTH TRUST 3180 NEWBERRY DR #200 SAN JOSE CA 95118	NONE	PC	MEDICAL RESEARCH	3,500.
SALVATION ARMY PO BOX 2D SAN JOSE CA 95109	NONE	PC	COMMUNITY SERVICE	5,500.
CREATV 255 W JULIAN ST, STE 100 SAN JOSE CA 95110	NONE	PC	COMMUNITY SERVICE	5,000.
CALIFORNIA EQUINE FOUNDATION PO BOX 88 NORTH MIDDLETOWN KY 40357	NONE	PC	COMMUNITY SERVICE	500.
EMQ AUXILARY 33 N SANTA CRUZ AVE LOS GATOS CA 95030	NONE	PC	COMMUNITY SERVICE	17,000.
TOWER FOUNDATION - SJSU ONE WASHINGTON SQUARE SAN JOSE CA 95192	NONE	PC	EDUCATION	503,000.

THE DAVIDSON FAMILY FOUNDATION

77-0325599

STATEMENT 7 (CONTINUED)
 FORM 990-PF, PART XV, LINE 3A
 RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
GREENPEACE 702 H STREET NW #300 WASHINGTON DC 20001	NONE	PC	COMMUNITY SERVICE	\$ 5,000.
RESOURCE AREA FOR TEACHERS 1355 RIDDER PARK DR SAN JOSE CA 95131	NONE	PC	EDUCATION	30,000.
PALM LAKE ELEMENTARY SCHOOL 8000 PIN OAK DRIVE ORLANDO FL 32819	NONE	PC	EDUCATION	5,000.
ACE CHARTER SCHOOLS 1100 SHASTA AVE SAN JOSE CA 95126	NONE	PC	EDUCATION	25,000.
AMERICAN SADDLEBRED ASSOC OF ARIZONA PO BOX 27257 SCOTTSDALE AZ 85255	NONE	PC	COMMUNITY SERVICE	7,000.
RAINFOREST ACTION NETWORK 425 BUSH ST, STE 300 SAN FRANCISCO CA 94108	NONE	PC	COMMUNITY SERVICE	5,000.
NORTHWEST SADDLEBRED ASSOCIATION 4284 SW ANDERSON RD FOREST GROVE OR 97116	NONE	PC	COMMUNITY SERVICE	500.
NU ALPHA KAPPA FRATERNITY, INC P. O. BOX 1278 ROSEVILLE CA 95678	NONE	PC	EDUCATION	50,000.
A GIFTED EDUCATION 6835 TRINIDAD DRIVE SAN JOSE CA 95120	NONE	PC	EDUCATION	2,500.
CRISTO REY HIGH SCHOOL 1389 E SANTA CLARA ST SAN JOSE CA 95116	NONE	PC	EDUCATION	20,000.
THE FIRST ACADEMY 2667 BRUTON BLVD ORLANDO FL 32805	NONE	PC	EDUCATION	5,000.
SAN FRANCISCO AIDS FOUNDATION 1035 MARKET STREET #400 SAN FRANCISCO CA 94103	NONE	PC	MEDICAL	500.

THE DAVIDSON FAMILY FOUNDATION

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STATEMENT 7 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
SO.CALIF AMER SADDLEBRED HORSE ASSOC 16136 LIVE OAK SPRINGS CANYON CANYON COUNTRY CA 91387	NONE	PC	COMMUNITY SERVICE	\$ 5,000.
ASPCA 520 8TH AVE NEW YORK NY 10018	NONE	PC	COMMUNITY SERVICE	5,000.
BAY AREA FOX TROTTER ASSOCIATION 767 CARR AVE SANTA ROSA CA 95403	NONE	PC	COMMUNITY SERVICE	3,500.
CHARITY FAIR HORSE SHOW PO BOX 67-5312 RANCHO SANTA FE CA 92067	NONE	PC	COMMUNITY SERVICE	5,000.
HEALTHIER KIDS FOUNDATION 4040 MOORPARK AVE, 100 SAN JOSE CA 95117	NONE	PC	COMMUNITY SERVICE	10,000.
PATH MAKING IT HOME 31 N 2ND ST #264 SAN JOSE CA 95113	NONE	PC	COMMUNITY SERVICE	20,000.
SJB CHILD DEVELOPMENT CENTER 1400 PARKMOOR AVE #220 SAN JOSE CA 95126	NONE	PC	COMMUNITY SERVICE	50,000.
THE TECH MUSEUM OF INNOVATION 201 S MARKET STREET SAN JOSE CA 95113	NONE	PC	COMMUNITY SERVICE	75,000.
ADELANTE DUAL LANGUAGE ACADEMY 2999 RIDGEMONT DR SAN JOSE CA 95127	NONE	PC	EDUCATION	1,500.
ALMADEN COUNTRY DAY SCHOOL 6835 TRINIDAD DR SAN JOSE CA 95120	NONE	PC	EDUCATION	25,000.
ARIZONA AMERICAN SADDLEBRED RESCUE, INC 44807 N 20TH ST NEW RIVER AZ 85087	NONE	PC	COMMUNITY SERVICE	5,000.

THE DAVIDSON FAMILY FOUNDATION

77-0325599

STATEMENT 7 (CONTINUED)
 FORM 990-PF, PART XV, LINE 3A
 RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
BREAKTHROUGH SILICON VALLEY 1635 PARK AVENUE SAN JOSE CA 95126	NONE	PC	EDUCATION	\$ 10,000.
CABRILLO COLLEGE FOUNDATION 6500 SOQUEL DRIVE APTOS CA 95003	NONE	PC	EDUCATION	25,000.
CAMBRIAN PARK SEVENTH-DAY ADVENTIST 5265 CARTER AVE SAN JOSE CA 95118	NONE	PC	RELIGION	5,000.
CHAVEZ FAMILY VISION PO BOX 23308 SAN JOSE CA 95153	NONE	PC	COMMUNITY SERVICE	20,000.
DIMOND L RANCH 1329 HWY 395 STE. 10-134 GARDNERVILLE NV 89410	NONE	PC	COMMUNITY SERVICE	12,000.
HILLEL SILICON VALLEY 44 S 11TH STREET SAN JOSE CA 95112	NONE	PC	RELIGION	2,500.
HORSE PLUS HUMANE SOCIETY PO BOX 485 HOHENWALD TN 38462	NONE	PC	COMMUNITY SERVICE	5,000.
LEGACY ACADEMY 484 E SAN FERNANDO ST SAN JOSE CA 95122	NONE	PC	EDUCATION	7,000.
MIRACLE MAKERS, INC 7041 GRAND NATIONAL DR #21 ORLANDO FL 32819	NONE	PC	COMMUNITY SERVICE	5,000.
MISS JO'S RESCUE RANCH 516 COUNTRY ROAD 4010 DECATUR TX 76234	NONE	PC	COMMUNITY SERVICE	10,000.
PONTES NETWORK 54 S 14TH STREET SAN JOSE CA 95144	NONE	PC	COMMUNITY SERVICE	5,000.
PROJECT INFORM 25 TAYLOR STREET SAN FRANCISCO CA 94102	NONE	PC	COMMUNITY SERVICE	6,000.
PROSTATE CANCER FOUNDATION 1250 FOURTH STREET SANTA MONICA CA 90401	NONE	PC	MEDICAL RESEARCH	2,000.

THE DAVIDSON FAMILY FOUNDATION

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STATEMENT 7 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
ROTACARE BAY AREA, INC 514 VALLEY WAY MILPITAS CA 95035	NONE	PC	MEDICAL	\$ 5,000.
RUNNING FREE EQUINE SANCTUARY HC 30 BOX 195 CONCHO AZ 85924	NONE	PC	COMMUNITY SERVICE	5,000.
SCARLETT'S LEGACY EQUINE RESCUE HC 60 BOX 197 WELLS NV 89835	NONE	PC	COMMUNITY SERVICE	5,000.
SOURCEWISE 2115 THE ALAMEDA SAN JOSE CA 95126	NONE	PC	COMMUNITY SERVICE	1,000.
ST FRANCIS CABRINI CATHOLIC CHURCH 15333 WOODARD RD SAN JOSE CA 95124	NONE	PC	RELIGION	500.
TOTAL				\$ <u>1,764,500.</u>

THE DAVIDSON FAMILY FOUNDATION

77-0325599

FORM 990PF - PART II, LINE 10B - BALANCE SHEET
INVESTMENTS - CORPORATE STOCKS/BONDS

RECAP: MORGAN STANLEY ACCOUNTS - MS
US TRUST - BANK OF AMERICA PRIVATE WEALTH MANAGEMENT - US T

	VALUATION METHOD	BOOK VALUE
US T 3886330	FMV	8,444,927
MS 9601-044	FMV	22,257,188
MS 5071-027	FMV	5,403,351
MS 7164-027	FMV	1,783,187
TOTAL		37,888,653

SEE ATTACHED PDF FOR DETAILS.