

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

2017

Department of the Treasury Internal Revenue Service

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Open to Public Inspection

For calendar year 2017 or tax year beginning 12/01, 2017, and ending 11/30, 2018

The Sylvan C Coleman Foundation 250 Lafayette Circle, Suite 100 Lafayette, CA 94549

Employer identification number 13-6091160 Telephone number 888-770-7574

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

Check type of organization. Section 501(c)(3) exempt private foundation, Section 4947(a)(1) nonexempt charitable trust, Other taxable private foundation

Fair market value of all assets at end of year \$3,858,693 Accounting method Cash

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).)

Table with 4 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12), Administrative Expenses (13-26), and Summary (27-29).

3/4

REVENUE

ADMINISTRATIVE EXPENSES

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end of year amounts only (See instructions)		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
ASSETS	1	Cash – non-interest-bearing		68,513.	14,445.	14,445.	
	2	Savings and temporary cash investments					
	3	Accounts receivable					
		Less: allowance for doubtful accounts					
	4	Pledges receivable					
		Less: allowance for doubtful accounts					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7	Other notes and loans receivable (attach sch)					
		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) Statement 4			2,626,983.	3,054,072.	3,844,248.	
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)			2,695,496.	3,068,517.	3,858,693.	
LIABILITIES	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.	
NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input type="checkbox"/>						
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>						
	27	Capital stock, trust principal, or current funds			2,695,496.	3,068,517.	
	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)			2,695,496.	3,068,517.		
31	Total liabilities and net assets/fund balances (see instructions)			2,695,496.	3,068,517.		

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	2,695,496.
2	Enter amount from Part I, line 27a	2	4,014.
3	Other increases not included in line 2 (itemize) ▶ See Statement 5	3	369,007.
4	Add lines 1, 2, and 3	4	3,068,517.
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	3,068,517.

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 WF 6628 ST	P	Various	Various
b WF 6628 LT	P	Various	Various
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 875,512.		901,217.	-25,705.
b 659,097.		493,347.	165,750.
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			-25,705.
b			165,750.
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	140,045.
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	-25,705.

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 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	183,500.	3,875,171.	0.047353
2015	192,257.	3,548,660.	0.054177
2014	184,035.	3,758,077.	0.048971
2013	185,710.	3,807,658.	0.048773
2012	160,409.	3,463,939.	0.046308

2 Total of line 1, column (d)	2	0.245582
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	0.049116
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	4,031,174.
5 Multiply line 4 by line 3	5	197,995.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,005.
7 Add lines 5 and 6	7	200,000.
8 Enter qualifying distributions from Part XII, line 4	8	196,500.

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 <input type="checkbox"/> 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. <input type="checkbox"/> and enter 1% of Part I, line 27b		1	4,010.
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	4,010.
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	4,010.
6 Credits/Payments.			
a 2017 estimated tax pmts and 2016 overpayment credited to 2017	6a		
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		162.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	See Statement 6	4,172.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2018 estimated tax	11	Refunded	

Part VII-A 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		X
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		
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 N/A		
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 <i>General Instruction G</i> ? 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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Form 990-PF (2017)

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	Yes	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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	X	
14	The books are in care of <u>Windsor Management</u> Telephone no <u>888-770-7574</u> Located at <u>250 Lafayette Circle, Suite 100 Lafayette CA</u> ZIP + 4 <u>94549</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>15</u>	N/A	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>		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.

1 a	During the year, did the foundation (either directly or indirectly):		Yes	No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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>			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?			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>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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)			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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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)			N/A
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			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?			X

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 Yes No

Organizations relying on a current notice regarding disaster assistance, check here

c If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No

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

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? Yes No

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? Yes No

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
Joan F Coleman 5330 Fernhoff Road Oakland, CA 94619	Trustee 0	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	3,955,041.
b Average of monthly cash balances	1 b	137,521.
c Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1 d	4,092,562.
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	4,092,562.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	61,388.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,031,174.
6 Minimum investment return. Enter 5% of line 5	6	201,559.

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	201,559.
2a Tax on investment income for 2017 from Part VI, line 5	2 a	4,010.		
b Income tax for 2017 (This does not include the tax from Part VI)	2 b			
c Add lines 2a and 2b			2 c	4,010.
3 Distributable amount before adjustments. Subtract line 2c from line 1			3	197,549.
4 Recoveries of amounts treated as qualifying distributions			4	
5 Add lines 3 and 4			5	197,549.
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	197,549.

Part XIII 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		196,500.
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		196,500.
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		196,500.

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				197,549.
2 Undistributed income, if any, as of the end of 2017.				
a Enter amount for 2016 only			183,826.	
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				
e From 2016				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 196,500.				
a Applied to 2016, but not more than line 2a			183,826.	
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				12,674.
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))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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				184,875.
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	0.			
10 Analysis of line 9				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
d Excess from 2016				
e Excess from 2017				

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
<p><i>a Paid during the year</i> See Statement 7</p>				
Total				▶ 3 a 196,500.
<p><i>b Approved for future payment</i></p>				
Total				▶ 3 b

Client SYLVANPF

The Sylvan C Coleman Foundation

13-6091160

Statement 1
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 Fees	\$ 10,206.	\$ 10,206.		
Total	<u>\$ 10,206.</u>	<u>\$ 10,206.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 2
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
Account Management Fees	\$ 21,277.	\$ 21,277.		
Total	<u>\$ 21,277.</u>	<u>\$ 21,277.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 3
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
2016 NY CHAR500 Fee	\$ 250.	\$ 250.		
Miscellaneous	75.	75.		
Total	<u>\$ 325.</u>	<u>\$ 325.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 4
Form 990-PF, Part II, Line 13
Investments - Other

<u>Other Investments</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Investment Other (see Schedule Attached)	Cost	\$ 3,054,072.	\$ 3,844,248.
Total		<u>\$ 3,054,072.</u>	<u>\$ 3,844,248.</u>

Client SYLVANPF

The Sylvan C Coleman Foundation

13-6091160

Statement 5
Form 990-PF, Part III, Line 3
Other Increases

Prior Period Adjustments	\$ 369,007.
Total	\$ <u>369,007.</u>

Statement 6
Form 990-PF, Part VI, Penalty and Interest
Balance Due

Tax Due	\$ 4,172.
Late Interest	50.
Total	\$ <u>4,222.</u>

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
A Safe Place PO Box 23006 Oakland CA 94623	NONE	PC	General Operating Purposes	\$ 3,000.
Access Women Health Justice PO Box 3609 Oakland CA 94609	NONE	PC	General Operating Purposes	6,000.
ACLU 39 Drumm Street San Francisco CA 94111	NONE	PC	General Operating Purposes	3,500.
Alameda County Meals on Wheels P.O. Box 14002 Oakland CA 94614	NONE	PC	General Operating Purposes	6,000.
Alameda Point Collaborative 677 West Ranger Avenue Alameda CA 94501	NONE	PC	General Operating Purposes	8,000.
Guttmacher Institute 125 Maiden Lane, 7th Floor New York NY 10038	NONE	PC	General Operating Purposes	4,000.
ALIVE 2723 King Street Alexandria VA 22302	NONE	PC	General Operating Purposes	6,000.

Client SYLVANPF

The Sylvan C Coleman Foundation

13-6091160

Statement 7 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
American Jewish World Service 45 West 36th Street New York NY 10018	NONE	PC	General Operating Purposes	\$ 3,000.
Ann Martin Children's Center 1375 55th Street Emeryville CA 94608	NONE	PC	General Operating Purposes	20,000.
Bikes for the World 1408 N. Fillmore Street, Suite 11 Arlington VA 22201	NONE	PC	General Operating Purposes	3,000.
Billings Forge Community Works 227 Lawrence Street, 2nd Floor Hartford CT 06106	NONE	PC	General Operating Purposes	5,000.
Breast Cancer Action 657 Mission Street, Suite 302 San Francisco CA 94105	NONE	PC	General Operating Purposes	6,000.
Cancer Plus 1 2133 Congresbury Place Upper Marlboro MD 20774	NONE	PC	General Operating Purposes	3,000.
Center for Reproductive Rights 199 Water Street, 22nd Floor New York NY 10038	NONE	PC	General Operating Purposes	8,000.
Charlotte Maxwell Complementary Clinic	NONE	PC	General Operating Purposes	5,000.
Commonweal P.O. Box 316 Bolinias CA 94924	NONE	PC	General Operating Purposes	5,000.
Connecticut Children's Medical Center 282 Washington Street Hartford CT 06106		PC	General Operating Purposes	4,000.

Client SYLVANPF

The Sylvan C Coleman Foundation

13-6091160

Statement 7 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Dance Place - D.C. Wheels Productions, I 3225 8th Street, NE Washington DC 20017		PC	General Operating Purposes	\$ 6,000.
Doctors Without Borders 333 Seventh Avenue, 2nd Floor New York NY 10001		PC	General Operating Purposes	6,000.
FINCA 1201 15th Street, NW, #800 Washington DC 20005		PC	General Operating Purposes	500.
Food Runners 2579 Washington Street San Francisco CA 94115		PC	General Operating Purposes	1,000.
Global Fund for Women 800 Market Street, 7th Fl San Francisco CA 94102		PC	General Operating Purposes	500.
Halleck Creek Ranch P.O. Box 159 Nicasio CA 94946		PC	General Operating Purposes	1,500.
House of Ruth 5 Thomas Circle Washington DC 20005		PC	General Operating Purposes	5,000.
Jewish Family and Children's Services of 2484 Shattuck Avenue, Suite 210 Berkeley CA 94704		PC	General Operating Purposes	10,000.
NARAL Pro-Choice America Foundation 1156 15th Street NW Washington DC 20005		PC	General Operating Purposes	2,000.
National Breast Cancer Coalition 1010 Vermont Avenue, NW, Suite 900 Washington DC 20005		PC	General Operating Purposes	1,000.
National Dance Education Organization 8609 2nd Avenue, Suite 203-B Silver Spring MD 20910		PC	General Operating Purposes	2,000.

Client SYLVANPF

The Sylvan C Coleman Foundation

13-6091160

Statement 7 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
National Women's Health Network 1413 K Street, NW, 4th Floor Washington DC 20005		PC	General Operating Purposes	\$. 5,000.
Planned Parenthood Mar Monte, Inc. 1605 The Alameda San Jose CA 95126		PC	General Operating Purposes	16,000.
Project Hope 255 Carter Hall Lane Millwood VA 22646		PC	General Operating Purposes	5,000.
Feeding America 1150 18th Street, NW, Suite 200 Washington DC 20036		PC	General Operating Purposes	1,000.
Tahirih Justice Center 6402 Arlington Boulevard, Suite 300 Falls Church VA 22042		PC	General Operating Purposes	2,000.
Wadsworth Atheneum Museum 600 Main Street Hartford CT 06103		PC	General Operating Purposes	2,500.
Women's Cancer Resource Center 2908 Ellsworth St. Berkeley CA 94705		PC	General Operating Purposes	25,000.
Chryallis Center 255 Homestead Avenue Hartford CT 06112		PC	General Operating Purposes	2,000.
UCONN Neag School of Education 249 Glenbrook Road, Unit 3064 Storrs CT 06269		PC	General Operating Purposes	4,000.
Total				\$ <u>196,500.</u>

Attachment to Form 990-PF

Form 990-PF, Part II, line 13

Investments - Corporate Stocks at Year End

	Description	Quantity	Cost Basis	Current Market Value
1	Abbott Laboratories	430	16,286.81	31,841.50
2	Abbvie Inc	497	32,558.47	46,852.19
3	Albemarle Corp	600	84,244.02	57,792.00
4	Alibaba Grp Holding ADR LTD Spon 1 RCPT= 1 Ord Shrs	876	136,288.81	140,913.36
5	Allergan Plc	159	33,304.80	24,899.40
6	Alphabet Inc Voting Cap Stk CL A	148	136,644.54	164,228.20
7	Alphabet Inc Non Voting Cap Stk CL C	9	3,537.89	9,849.87
8	Amazon Com Inc	88	17,245.50	148,734.96
9	Amgen Inc	247	39,253.91	51,437.75
10	Apple Inc	882	33,330.58	157,507.56
11	Arista Networks Inc	264	33,618.57	62,958.72
12	Boeing Co	446	143,724.22	154,654.96
13	Caterpillar Inc	875	113,663.81	118,711.25
14	Comcast Corp New CL A	1,300	24,002.00	50,713.00
15	Costco Whsl Corp New Com	225	17,666.96	52,038.00
16	Disney Walt Company	310	6,720.93	35,801.90
17	Exxon Mobil Corp	576	45,842.48	45,792.00
18	Facebook Inc	440	21,161.22	61,868.40
19	First Republic Bank San Francisco Calif	798	76,101.67	79,121.70
20	FMC Corp New	533	47,477.61	44,100.42
21	Freeport-McMoran Inc Class B	4,358	83,147.21	52,034.52
22	Gilead Sciences Inc	549	29,468.92	39,495.06
23	Goldman Sachs Group Inc	438	99,153.80	83,522.22
24	Golub Cap Bdc Inc	2,530	47,754.95	46,830.30
25	Home Depot Inc	239	10,563.19	43,096.48
26	Honeywell International Inc	330	9,004.90	48,427.50
27	Intuitive Surgical Inc Com New	182	83,304.51	96,618.34
28	Ishares MSCI China	2,322	126,526.65	133,468.56
29	Ishares Currency ETF Hedged MSCI EAFE ETF	5,354	157,096.18	150,929.26
30	Ishares MSCI ETF Emerging Markets	955	37,951.70	39,231.40
31	Ishares MSCI EAFE Index	1,885	115,541.08	118,321.45
32	JPMorgan Chase & Co	490	19,373.08	54,483.10
33	KKR & Co Inc	3,053	83,781.34	69,974.76
34	Lyondellbasell Industries AF SCA Class A	397	36,384.42	37,044.07

Attachment to Form 990-PF

Form 990-PF, Part II, line 13

Investments - Corporate Stocks at Year End

	Description	Quantity	Cost Basis	Current Market Value
35	Merck & Co Inc New	470	24,532.63	37,289.80
36	Micron Technology Inc	2,078	107,462.66	80,127.68
37	Palo Alto Networks	294	35,723.08	50,847.30
38	Procter & Gamble Co	370	11,782.55	34,968.70
39	Qualcomm Inc	733	43,354.32	42,704.58
40	Raytheon Company	490	76,005.68	85,916.60
41	Salesforce com	412	14,067.53	58,817.12
42	Thermo Fisher Scientific Inc	390	58,081.31	97,324.50
43	Twenty-First Century CL A	2,845	83,286.24	140,742.15
44	United Technologies Corp	260	11,514.10	31,678.40
45	Verizon Communications Com	897	42,818.47	54,089.10
46	Woodward Inc	1,061	76,253.54	88,784.48
47	Xilinx Inc	625	38,454.31	57,800.00
Total Stocks		43,710	\$ 2,625,063.15	\$ 3,414,384.57
Mutual Funds				
1	Blackrock Science & Technology TR	2,662	53,163.77	79,860.00
2	Appolo Tactical Income Fund	2,955	47,219.98	43,202.10
3	Blackrock Multi-Sector Income Trust	2,584	44,304.55	41,473.20
4	CBRE Clarion Global Real Estate Income Fund	11,365	83,322.15	77,622.95
5	The India Fund	1,272	31,271.30	28,467.36
6	KKR Income Opportunities FD	2,888	47,625.69	43,897.60
7	Morgan Stanley Emerg Mkts FD	4,546	69,217.58	76,327.34
8	Tortoise Energy Infrastructure	1,727	52,883.85	39,012.93
		29,999	\$429,008.87	\$429,863.48
Total Line 13		73,709	\$3,054,072.02	\$3,844,248.05