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EXTENDED TO JULY 15, 2020

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.

1906

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning JUL 1, 2018 , and ending JUN 30, 2019

Name of foundation		A Employer identification number
ARCHSTONE FOUNDATION		33-0133359
Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number
301 E. OCEAN BLVD	1850	562-590-8655
City or town, state or province, country, and ZIP or foreign postal code		C If exemption application is pending, check here ▶ ☐
LONG BEACH, CA 90802		

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

D 1. Foreign organizations, check here ▶ ☐

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

03
04

H Check type of organization: [X] Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

04

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 112,731,538.

J Accounting method: ☐ Cash [X] Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

		(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			N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	28,339.	2,625,525.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	3,264,350.			STATEMENT 1
	b Gross sales price for all assets on line 6a 1,700,791.				
	7 Capital gain net income (from Part IV, line 2)		1,696,985.		
	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)				
	11 Other income	-25,914.	300,993.		STATEMENT 3
	12 **Total.** Add lines 1 through 11	3,266,775.	4,623,503.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	853,872.	63,524.		782,400.
	14 Other employee salaries and wages	546,159.	10,186.		532,357.
	15 Pension plans, employee benefits	278,608.	15,845.		266,080.
	16a Legal fees STMT 4	51,359.	3,221.		42,480.
	b Accounting fees STMT 5	73,350.	5,724.		74,012.
	c Other professional fees STMT 6	580,250.	580,250.		0.
	17 Interest				
	18 Taxes STMT 7	117,604.	4,056.		75,797.
	19 Depreciation and depletion	67,508.	0.		
	20 Occupancy	175,351.	12,313.		162,414.
	21 Travel, conferences, and meetings	142,541.	9,736.		128,418.
	22 Printing and publications	48,763.	1,832.		24,813.
	23 Other expenses STMT 8	785,201.	20,765.		736,076.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	3,720,566.	727,452.		2,824,847.
	25 Contributions, gifts, grants paid	4,367,506.			4,163,746.
	26 **Total expenses and disbursements.** Add lines 24 and 25	8,088,072.	727,452.		6,988,593.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-4,821,297.			
	b **Net investment income** (if negative, enter -0-)		3,896,051.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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823501 12-11-18 LHA For Paperwork Reduction Act Notice, see instructions. 3 Form **990-PF** (2018)

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12220713 794084 10797 2018.06000 ARCHSTONE FOUNDATION 10797__1

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing	347.	347.	347.
	2 Savings and temporary cash investments	609,190.	2,302,432.	2,302,432.
	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			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	190,324.	159,006.	159,006.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 9	115,362,683.	109,927,175.	109,927,175.
	14 Land, buildings, and equipment: basis ▶ 609,873.			
	Less accumulated depreciation ▶ 286,589.	377,676.	323,284.	323,284.
	15 Other assets (describe ▶ DEPOSITS)	19,294.	19,294.	19,294.
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	116,559,514.	112,731,538.	112,731,538.
Liabilities	17 Accounts payable and accrued expenses	310,359.	341,127.	
	18 Grants payable	1,778,903.	1,977,663.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 10)	1,449,145.	1,319,570.	
	23 Total liabilities (add lines 17 through 22)	3,538,407.	3,638,360.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ [X] and complete lines 24 through 26, and lines 30 and 31.			
	24 Unrestricted	113,021,107.	109,093,178.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [ ] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 29 Total net assets or fund balances	113,021,107.	109,093,178.	
	31 30 Total liabilities and net assets/fund balances	116,559,514.	112,731,538.	

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	113,021,107.
2	Enter amount from Part I, line 27a	2	-4,821,297.
3	Other increases not included in line 2 (itemize) ▶ UNREALIZED GAIN ON INVESTMENTS	3	893,368.
4	Add lines 1, 2, and 3	4	109,093,178.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	109,093,178.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	RUSSELL CORE BOND FUND SEC 1256	P	07/01/18	06/30/19
b	RUSSELL MULTI ASSET CORE PLUS FUND SEC 1256	P	07/01/18	06/30/19
c	RUSSELL LOW DURATION BOND FUND SEC 1256	P	07/01/18	06/30/19
d	RUSSELL CORE BOND FUND	P	07/01/18	06/30/19
e	RUSSELL MULTI ASSET CORE PLUS FUND	P	07/01/18	06/30/19
f	RUSSELL LOW DURATION BOND FUND	P	07/01/18	06/30/19
g	RUSSELL INVESTMENT REAL ESTATE EQUITY FUND	P	07/01/18	06/30/19
h	BOOK TO TAX ADJUSTMENT	P	07/01/18	06/30/19
i				
j				
k				
l				
m				
n				
o				

	(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	176,669.			176,669.
b	221,420.			221,420.
c	5,360.			5,360.
d	15,003.			15,003.
e	1,228,191.			1,228,191.
f			3,806.	-3,806.
g	54,148.			54,148.
h				0.
i				
j				
k				
l				
m				
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				176,669.
b				221,420.
c				5,360.
d				15,003.
e				1,228,191.
f				-3,806.
g				54,148.
h				0.
i				
j				
k				
l				
m				
n				
o				

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	1,696,985.
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). If (loss), enter "-0-" in Part I, line 8	3	N/A

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 shs. MLC Co)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b	SEE ATTACHED STATEMENT			
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				
b				
c				
d				
e	1,700,791.		3,806.	1,696,985.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

	(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				1,696,985.

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 — 1,696,985.

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).
If (loss), enter -0- in Part I, line 8 — 3 — N/A

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))
2017	6,812,334.	117,745,760.	.057856
2016	6,544,900.	111,006,625.	.058960
2015	6,474,651.	107,717,461.	.060108
2014	6,333,280.	116,163,851.	.054520
2013	7,103,961.	115,652,570.	.061425

2 Total of line 1, column (d)	2	.292869
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	.058574
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	110,847,321.
5 Multiply line 4 by line 3	5	6,492,771.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	38,961.
7 Add lines 5 and 6	7	6,531,732.
8 Enter qualifying distributions from Part XII, line 4	8	6,988,593.

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.

3

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

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b		1	38,961.
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	38,961.
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	38,961.
6 Credits/Payments			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a 170,569.		
b Exempt foreign organizations - tax withheld at source	6b 0.		
c Tax paid with application for extension of time to file (Form 8868)	6c 0.		
d Backup withholding erroneously withheld	6d 0.		
7 Total credits and payments. Add lines 6a through 6d		7	170,569.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached		8	0.
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	131,608.
11 Enter the amount of line 10 to be: **Credited to 2019 estimated tax** ▶	131,608. **Refunded** ▶	11	0.

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		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?	1c		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.	2		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	3	X	
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T*	5		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?	6	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	7	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ CA			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G*? If "No," attach explanation	8b	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 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		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?	13	X	

Website address ▶ WWW.ARCHSTONE.ORG

14 The books are in care of ▶ CHRISTOPHER A. LANGSTON Telephone no. ▶ 562-590-8655

Located at ▶ 301 EAST OCEAN BLVD., SUITE 1850, LONG BEACH, CA ZIP+4 ▶ 90802

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

			Yes	No
16	At any time during calendar year 2018, 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?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year, did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		X
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
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 2018?	1c		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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
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	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2018 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 2018.) N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		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 2018?	4b		X

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions N/A	5b		
Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No			
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		X
If "Yes" to 6b, file Form 8870.			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No			
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ 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.

(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
SEE STATEMENT 11		853,872.	117,989.	11,400.

2 Compensation of five highest-paid employees (other than those included on line 1). 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
LAURA RATH - 301 EAST OCEAN BLVD., STE 1850, LONG BEACH, CA 90802	SENIOR PROGRAM OFFICER 40.00	122,386.	44,742.	6,000.
JOLENE FASSBINDER - 301 EAST OCEAN BLVD., STE 1850, LONG BEACH, CA	PROGRAM OFFICER 40.00	110,250.	44,556.	6,000.
TANISHA DAVIS - 301 EAST OCEAN BLVD., STE 1850, LONG BEACH, CA	GRANTS MANAGER 40.00	89,786.	29,005.	2,400.
CONSUELO PENA - 301 EAST OCEAN BLVD., STE 1850, LONG BEACH, CA	EXECUTIVE ASSISTANT AND BOOKKEEPER 40.00	84,510.	30,477.	4,200.

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. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
RUSSELL TRUST COMPANY 1301 SECOND AVENEUE, SEATTLE, WA 98101	INVESTMENT MANAGEMENT	580,250.
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**

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.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities		1a	110,812,779.
b	Average of monthly cash balances		1b	1,301,311.
c	Fair market value of all other assets		1c	421,261.
d	Total (add lines 1a, b, and c)		1d	112,535,351.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	112,535,351.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	1,688,030.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	110,847,321.
6	**Minimum investment return.** Enter 5% of line 5		6	5,542,366.

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	5,542,366.
2a	Tax on investment income for 2018 from Part VI, line 5	2a 38,961.		
b	Income tax for 2018. (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	38,961.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	5,503,405.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	5,503,405.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	5,503,405.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	6,988,593.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the.		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	6,988,593.
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	5	38,961.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	6,949,632.

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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				5,503,405.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years. ____, ____, ____		0.		
3 Excess distributions carryover, if any, to 2018.				
a From 2013 1,603,967.				
b From 2014 717,165.				
c From 2015 1,113,404.				
d From 2016 1,128,919.				
e From 2017 1,122,708.				
f **Total** of lines 3a through e	5,686,163.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ $ 6,988,593.				
a Applied to 2017, 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 2018 distributable amount				5,503,405.
e Remaining amount distributed out of corpus	1,485,188.			
5 Excess distributions carryover applied to 2018 (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	7,171,351.			
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 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				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 2013 not applied on line 5 or line 7	1,603,967.			
9 **Excess distributions carryover to 2019.** Subtract lines 7 and 8 from line 6a	5,567,384.			
10 Analysis of line 9				
a Excess from 2014 717,165.				
b Excess from 2015 1,113,404.				
c Excess from 2016 1,128,919.				
d Excess from 2017 1,122,708.				
e Excess from 2018 1,485,188.				

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 2018, 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)

	Tax year	Prior 3 years			
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

SEE STATEMENT 12

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

c Any submission deadlines.

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

Part XV Supplementary Information *(continued)*

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient: 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 ATTACHMENT B 301 EAST OCEAN BLVD., SUITE 1850 LONG BEACH, CA 90802		SEE ATTACHMENT B	SEE ATTACHMENT C	4,163,746.
Total			▶ 3a	4,163,746.
b *Approved for future payment*				
SEE ATTACHMENT C 301 EAST OCEAN BLVD., SUITE 1850 LONG BEACH 90802		SEE ATTACHMENT C	SEE ATTACHMENT D	1,646,157.
Total			▶ 3b	1,646,157.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	28,339.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			18	-25,914.	
8 Gain or (loss) from sales of assets other than inventory			18	3,264,350.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		3,266,775.	0.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 3,266,775.

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (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	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (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: [signature] Date: 7/15/2020 Title: PRESIDENT/CEO

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

Paid Preparer Use Only				
Print/Type preparer's name: DONITA M. JOSEPH	Preparer's signature: DONITA M. JOSEPH	Date: 07/13/20	Check ☐ if self-employed	PTIN: P00286656
Firm's name ▶ WINDES, INC.			Firm's EIN ▶ 95-3001179	
Firm's address ▶ P.O. BOX 87 LONG BEACH, CA 90801-0087			Phone no. (562)435-1191	

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY				MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
RUSSELL CORE BOND FUND SEC 1256				PURCHASED	07/01/18	06/30/19
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
	176,669.	176,669.	0.	0.	0.	

(A) DESCRIPTION OF PROPERTY				MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
RUSSELL MULTI ASSET CORE PLUS FUND SEC 1256				PURCHASED	07/01/18	06/30/19
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
	221,420.	221,420.	0.	0.	0.	

(A) DESCRIPTION OF PROPERTY				MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
RUSSELL LOW DURATION BOND FUND SEC 1256				PURCHASED	07/01/18	06/30/19
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
	5,360.	5,360.	0.	0.	0.	

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
RUSSELL CORE BOND FUND	PURCHASED	07/01/18	06/30/19

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
15,003.	15,003.	0.	0.	0.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
RUSSELL MULTI ASSET CORE PLUS FUND	PURCHASED	07/01/18	06/30/19

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,228,191.	1,228,191.	0.	0.	0.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
RUSSELL LOW DURATION BOND FUND	PURCHASED	07/01/18	06/30/19

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	-3,806.	3,806.	0.	0.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
RUSSELL INVESTMENT REAL ESTATE EQUITY FUND	PURCHASED	07/01/18	06/30/19

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
54,148.	54,148.	0.	0.	0.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
BOOK TO TAX ADJUSTMENT	PURCHASED	07/01/18	06/30/19

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	-3,264,350.	0.	0.	3,264,350.

CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	3,264,350.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
INTEREST	28,339.	0.	28,339.	28,339.	
TO PART I, LINE 4	28,339.	0.	28,339.	28,339.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
K-1 RUSSELL CORE BOND FUND	0.	-9,197.	
K-1 RUSSELL MULTI ASSET CORE PLUS FUND	0.	448,616.	
K-1 RUSSELL LOW DURATION BOND FUND	0.	705.	
K-1 RUSSELL ESTATE EQUITY FUND	0.	-139,131.	
INVESTMENT INCOME - DEFERRED COMPENSATION	-25,914.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	-25,914.	300,993.	

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	51,359.	3,221.		42,480.
TO FM 990-PF, PG 1, LN 16A	51,359.	3,221.		42,480.

FORM 990-PF ACCOUNTING FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	73,350.	5,724.		74,012.
TO FORM 990-PF, PG 1, LN 16B	73,350.	5,724.		74,012.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	580,250.	580,250.		0.
TO FORM 990-PF, PG 1, LN 16C	580,250.	580,250.		0.

FORM 990-PF TAXES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	78,987.	3,943.		74,304.
PROPERTY TAXES	1,617.	113.		1,493.
FEDERAL EXCISE TAX	37,000.	0.		0.
TO FORM 990-PF, PG 1, LN 18	117,604.	4,056.		75,797.

FORM 990-PF OTHER EXPENSES STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
HOLIDAY BENEFIT/BONUS	3,500.	245.		3,232.
COMMUNICATIONS	159,615.	11,220.		147,988.
CONSULTATION FEES	108,415.	0.		107,374.
EDUCATION	16,956.	1,208.		15,932.
EQUIPMENT RENTAL & MAINTENANCE	23,059.	1,613.		21,282.
GRANT RELATED EXPENSES	68,588.	0.		68,587.
GRANTEE EVALUATIONS	218,136.	0.		187,889.
INSURANCE	40,504.	2,822.		37,221.
MEMBERSHIP AND DUES	38,043.	2,647.		34,918.
MISCELLANEOUS	2,877.	557.		2,574.
OFFICE SUPPLIES EXPENSES	5,197.	361.		4,757.
ORGANIZATIONAL SUPPORT	99,000.	0.		98,334.
POSTAGE AND SHIPPING	1,311.	92.		1,211.
RELOCATION EXPENSE	0.	0.		4,777.
TO FORM 990-PF, PG 1, LN 23	785,201.	20,765.		736,076.

FORM 990-PF OTHER INVESTMENTS STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
RUSSELL CORE BOND FUND	FMV	8,266,430.	8,266,430.
RUSSELL LOW DURATION BOND	FMV	2,081,416.	2,081,416.
RUSSELL MULTI CORE ASSETT	FMV	78,327,972.	78,327,972.
RUSSELL TTL RETURN	FMV	12,402,244.	12,402,244.
RUSSELL REAL ESTATE	FMV	8,849,113.	8,849,113.
TOTAL TO FORM 990-PF, PART II, LINE 13		109,927,175.	109,927,175.

FORM 990-PF OTHER LIABILITIES STATEMENT 10

DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFERRED COMPENSATION	1,116,364.	998,998.
DEFERRED RENT	332,781.	320,572.
TOTAL TO FORM 990-PF, PART II, LINE 22	1,449,145.	1,319,570.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 11

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
CHRISTOPHER A. LANGSTON 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	PRESIDENT/CEO 40.00	180,727.	14,784.	2,400.
JOSEPH F. PREVRATIL 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	PRESIDENT/CEO 40.00	239,094.	36,520.	4,200.
MARY ELLEN KULLMAN 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	VICE PRESIDENT 40.00	175,551.	66,685.	4,800.
DIANA M. BONTA 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	DIRECTOR 2.00	38,000.	0.	0.
LYNN DAUCHER 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	DIRECTOR 2.00	36,500.	0.	0.
AMYE L. LEONG 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	DIRECTOR 2.00	36,000.	0.	0.
ROCKY SUARES 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	DIRECTOR 2.00	38,000.	0.	0.
RENEE B. SIMON 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	DIRECTOR 2.00	38,000.	0.	0.
MARK SMITH 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	DIRECTOR 2.00	36,000.	0.	0.
PETER SZUTU 301 EAST OCEAN BLVD, SUITE 1850 LONG BEACH, CA 90802	DIRECTOR 2.00	36,000.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		853,872.	117,989.	11,400.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 12
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARY ELLEN KULLMAN, M.P.H., VICE PRESIDENT
301 EAST OCEAN BLVD., SUITE 1850
LONG BEACH, CA 90802

TELEPHONE NUMBER	NAME OF GRANT PROGRAM
(562) 590-8655	SEE ATTACHED STATEMENT A

FORM AND CONTENT OF APPLICATIONS

SEE ATTACHED STATEMENT A FOR MORE INFORMATION, SEE OUR WEBSITE AT HTTP://WWW.ARCHSTONE.ORG

ANY SUBMISSION DEADLINES

SEE ATTACHMENT STATEMENT A FOR INFORMATION, PLEASE VISIT OUR WEBSITE AT HTTP://WWW.ARCHSTONE.ORG

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE ARCHSTONE FOUNDATION IS A PRIVATE GRANTMAKING ORGANIZATION, WHOSE MISSION IS TO CONTRIBUTE TOWARDS THE PREPARATION OF SOCIETY IN MEETING THE NEEDS OF AN AGING POPULATION. SEE ATTACHED STATEMENT A FOR MORE INFORMATION, PLEASE VISIT OUR WEBSITE AT HTTP://WWW.ARCHSTONE.ORG

GENERAL EXPLANATION STATEMENT 13

FORM/LINE IDENTIFIER

FORM 99PF, PART I, LINE 11

EXPLANATION:

THE ARCHSTONE FOUNDATION INVESTS IN INSTITUTIONAL FUNDS STRUCTURED AS MUTUAL FUNDS, LIMITED LIABILITY CORPORATIONS (LLC) AND LIMITED PARTNERSHIPS (LLP). THE FOUNDATION HANDLES THE BOOK REPORTING IN THE SAME MANNER FOR ALL FUNDS. INTEREST AND DIVIDENDS, SALES AND DISTRIBUTIONS FROM A POSITION IN AN INSTITUTIONAL FUND ITSELF RESULTS IN REALIZED INCOME FOR BOOK PURPOSES. THIS IS NOT THE CASE FOR FUNDS ORGANIZED AS LIMITED LIABILITY COMPANIES AND LIMITED PARTNERSHIPS WHICH ARE "PASS THROUGH ENTITIES" FOR TAX PURPOSES. FOR THESE "PASS THROUGH ENTITIES" THE FOUNDATION IS REQUIRED TO REPORT AS ITS OWN TAXABLE INCOME ITS PRO RATA SHARE OF THE INCOME, EXPENSES, GAINS, AND LOSSES EARNED INSIDE THE LLPS AND LLCS. THESE ARE REPORTED TO THE FOUNDATION USING SCHEDULE K-1'S PER THE INTERNAL REVENUE SERVICE'S REQUIREMENTS. THE TAXATION OF INCOME EARNED INSIDE THE ENTITY THROUGH THE K-1 RESULTS IN AN ADJUSTMENT OF THE BASIS OF THE UNITS OWNED BY THE ORGANIZATION SO THAT THE BASIS IS EQUAL TO THE VALUE OF THOSE UNITS AND THERE IS NO INCOME TO BE RECOGNIZED WHEN A DISTRIBUTION FROM THE INSTITUTIONAL FUND ITSELF OCCURS FOR TAX PURPOSES.

THE FOUNDATION HAS DISTINGUISHED BETWEEN MUTUAL FUND (MF) TYPE INVESTMENTS AND PASS THROUGH ENTITIES (PT) FOR REPORTING DONE FOR BOOK PURPOSES(SCHEDULE 1) VS. TAX PURPOSES (PART IV OF 990PF). THE ORGANIZATION HAS ALSO DISTINGUISHED BETWEEN DISTRIBUTIONS (DIST) AND K-1 PASS THROUGH INFORMATION(K-1). THE DISTRIBUTIONS RESULT IN REALIZED GAIN/LOSS FOR BOOKS BUT ARE NOT TAXABLE WHILE GAINS AND LOSSES REPORTED ON K-1 ARE REPORTABLE FOR TAX PURPOSES BUT HAVE NOT BEEN SEPARATELY REPORTED FOR BOOKS.

Archstone Foundation
FYE 6/30/19

Attachment A
Form 990 PF, PART XV, LINES 2B-2D

Full Proposal Requirements

If the Foundation has issued a Request for Proposal (RFP), or in response to a LOI that fits within the Foundation's priorities, an organization may be asked to submit a Full Proposal. Program staff will be responsive to questions during the development of the Full Proposal. In no more than eight pages, the proposal should address the required components noted below in items one through eight. Items nine through 16 may be included as attachments.

1 A grant application cover sheet (http.//archstone.org/how-we-work/for-grantseekers/full-proposal-requirements/full-proposal-grant-application-cover-sheet),
2 A one paragraph executive summary that includes the amount being requested, number served (and population description including socioeconomic status and demographics of older adults served), project goals and objectives, and how funds will be used
3 Background on the issue/need(s) to be addressed,
4 The conceptual framework and rationale for the project,
5 Background of the organization and its capacity to undertake the work,
6 A project description, including the goals, objectives, timeline and specific activities to be funded,
7 A plan for evaluating the project and its anticipated outcomes, please include specific measurements,
8 A plan for sustaining or continuing the project upon the completion of the proposed grant (if appropriate),
9 A description of the qualifications of key project staff (i e , resume) and job descriptions for those to be hired,
10 A detailed line-item budget (http.//archstone.org/how-we-work/for-grantseekers/full-proposal-requirements/line-item-budget-templates) for the total project and the amount requested, accompanied by a budget narrative (http.//archstone.org/how-we-work/for-grantseekers/full-proposal-requirements/budget-narrative-guidelines), explaining how the funds will be used (please use one year, two year and three years budget templates),
11 A list of grants received during the past two years,
12 A list of pending applications by source of funding,
13 List of Board of Directors and principal occupations,
14 Current organization's operating budget,
15 If applicable, Memorandum of Agreements (MOAs) that specify roles and responsibilities, and
16 An electronic copy (on flashdrive or disk) of the proposal's narrative, line-item budget, and budget narrative readable in Word and/or Excel

Full proposals should be mailed to the designated Foundation program staff member at:

Archstone Foundation
301 E Ocean Blvd , Suite 1850
Long Beach, CA 90802

Full Proposal Review Process

Full Proposals meeting the guidelines and priorities of the Foundation are reviewed by the Proposal Review Committee (PRC), a sub-committee of the Foundation's Board. This committee will refer a slate of proposals to the Board of Directors for consideration The Board meets quarterly to make funding decisions Generally, the review process takes four to six months from receipt of the funding request.

Archstone Foundation
FYE 6/30/19

Attachment B
Form 990 PF, PART XV, LINE 3A

Grant Number	Organization Name	Mailing Address	Grant Purpose	Payment Date	Amount
14-01-01	Regents of the University of California, Davis	1850 Research Park Drive, Suite 300 Davis, CA 95618-6153	To serve as a consultant to the Archstone Foundation on the topic of depression in late life	April 8, 2019	$ 7,901
14-01-05	The Medical University Of South Carolina Foundation	18 Bee St, MSC 450 Charleston, SC 29425-8910	To conduct a follow-up study to the 2009 National Elder Mistreatment Study (NEMS) to assess health and mental health outcomes of elder abuse victims	May 15, 2019	$ 10,908
14-03-49	University of Southern California	Sponsored Projects Accounting 3500 S Figueroa Street, Suite 102 Los Angeles, CA 90089-8001	To implement and evaluate the Cuerpo Sano, Mente Sana (Healthy Body, Healthy Mind) project, a group self-management program for Latino primary care patients who have chronic medical illness and depression.	November 19, 2018	$ 6,096
14-04-61	Regents of the University of California, Los Angeles	Box 957089, 1125 Murphy Hall 405 Hilgard Avenue Los Angeles, CA 90095-9000	To support the Improving Caregiving for Dementia (I-CareD) project	December 10, 2018	$ 14,958
14-04-71	University of Washington	3917 University Way NE, Room 150Seattle, WA 98195-9472	To support the Innovations Bridging Clinics and Communities to Advance Late-Life Depression Care Initiative	November 19, 2018	$ 37,329
15-01-15	National Adult Protective Services Association	PO Box 96503 PMB #74669 Washington, DC 20090	To support the creation of a National Adult Protective Services Training Certificate Program	August 15, 2018	$ 4,969
15-04-52	Jacobs & Cushman San Diego Food Bank	9850 Distribution Avenue San Diego, CA 92121	To support a program that seeks to provide low-income older adults in San Diego County with nutrition education and monthly distributions of fresh, nutritious produce, while addressing the combined problem of hunger, nutritional disease,	November 8, 2018	$ 7,517
16-01-06	Regents of the University of California, San Francisco	Contracts and Grants Accounting, Box 0897 1855 Folsom Street, Suite 425 San Francisco, CA 94143	To support the Palliative Care Quality Network (PCQN) in meeting the needs of its members for community-based data collection and reporting, to grow membership, disseminate findings, foster a supportive community, and ensure long term	December 19, 2018	$ 14,580
16-01-09	California State University San Marcos	335 S Twin Oaks Valley Road San Marcos, California 92096-0001	To support the continuation and establishment of the CSU Institute for Palliative Care as the CSU system "hub" for palliative care training	December 19, 2018	$ 15,000

ARCHSTONE FOUNDATION
Grants Paid in FY 2019

16-01-10	City of Hope National Medical Center	Beckman Research Institute Nursing Research and Education Duarte, CA 91010-3000	To support the Communication Training for an Expanded Workforce in Palliative Care project, which will expand communication education for interdisciplinary professionals in palliative care	February 11, 2019	$	12,500
16-04-20	Grantmakers In Aging, Inc	Lumix CPAs and Advisors 8401 Connecticut Ave #1202 Chevy Chase, MD 20815	To support organizational development and core programmatic activities	November 2, 2018	$	5,000
17-02-06	San Francisco Village	3220 Fulton Street San Francisco, CA 94118	To support the design, implementation, and launch of the California Village Coalition	January 9, 2019	$	126,627
17-02-06	San Francisco Village	3220 Fulton Street San Francisco, CA 94118	To support the design, implementation, and launch of the California Village Coalition	April 10, 2019	$	26,080
17-02-07	Alzheimer's Greater Los Angeles	4221 Wilshire Blvd , Suite 400 Los Angeles, CA 90010	To support the Regional Implementation and Evaluation of the Savvy Caregiver Express project, an evidenced-based educational series, designed to train family caregivers to handle the stress of caring for family members with cognitive	March 26, 2019	$	4,942
17-02-08	Center for Elders' Independence	510 17th Street, Suite 400 Oakland, CA 94612	To support the Caring for the Caregiver Education and Support Program The program will be delivered to up to 40 unpaid caregivers	December 19, 2018	$	3,326
17-03-13	Benjamin Rose Institute on Aging	11890 Fairhill Road Cleveland, OH 44120	To establish the Online Resource for Comparing Evidence-Based Dementia Caregiving Programs	July 16, 2018	$	7,856
17-03-13	Benjamin Rose Institute on Aging	11890 Fairhill Road Cleveland, OH 44120	To establish the Online Resource for Comparing Evidence-Based Dementia Caregiving Programs	May 1, 2019	$	43,430
17-04-15	Grantmakers in Health	1100 Connecticut Avenue NW Suite 1200 Washington, DC 20036	To support the GIH-GIA collaborative Strengthening Healthy Aging Philanthropy	August 31, 2018	$	6,018

18-01-01	University of Washington	Grant and Contract Accounting 12455 Collections Drive Chicago, IL 60693	To support technical assistance, training, and evaluation for Phase 2 of the Care Partners Depression in Late-Life Initiative	August 31, 2018	$ 738,541
18-01-01	University of Washington	Grant and Contract Accounting 12455 Collections Drive Chicago, IL 60693	To support technical assistance, training, and evaluation for Phase 2 of the Care Partners Depression in Late-Life Initiative	November 28, 2018	$ 49,051
18-01-02	El Sol Neighborhood Educational Center	PO Box 449San Bernardino, CA 92402	To support the San Bernardino Depression in Late-Life Program II, continuation project	August 31, 2018	$ 90,000
18-01-02	El Sol Neighborhood Educational Center	PO Box 449San Bernardino, CA 92402	To support the San Bernardino Depression in Late-Life Program II, continuation project	November 19, 2018	$ 10,000
18-01-03	Family Health Centers of San Diego	823 Gateway Center Way San Diego, CA 92102	To support the Community Collaborative Care Partnership (CCCP) Expansion	August 31, 2018	$ 90,000
18-01-03	Family Health Centers of San Diego	823 Gateway Center Way San Diego, CA 92102	To support the Community Collaborative Care Partnership (CCCP) Expansion	November 2, 2018	$ 10,000
18-01-04	County of Sonoma, Human Services Department	Adult and Aging Division 3725 Westwind Blvd , Suite 101 Santa Rosa, CA 95403	To support the Sonoma Care Collaborative Project (SCCP), continuation	August 31, 2018	$ 90,000
18-01-04	County of Sonoma, Human Services Department	Adult and Aging Division 3725 Westwind Blvd , Suite 101 Santa Rosa, CA 95403	To support the Sonoma Care Collaborative Project (SCCP), continuation	February 28, 2019	$ 10,000
18-01-05	National Alliance for Caregiving	4720 Montgomery Lane Suite 205 Bethesda, MD 20814	To support the National Network of Caregiving Coalitions - 2018 Program	December 19, 2018	$ 5,090

18-01-06	University of Southern California	Sponsored Projects Accounting 3500 S Figueroa Street, Suite 102 Los Angeles, CA 90089-8001	To support the Teaching Caregivers How to Prevent Elder Abuse via Technology (Tech Prevent) program	November 19, 2018	$	61,035
18-01-06	University of Southern California	Sponsored Projects Accounting 3500 S Figueroa Street, Suite 102 Los Angeles, CA 90089-8001	To support the Teaching Caregivers How to Prevent Elder Abuse via Technology (Tech Prevent) program	January 10, 2019	$	12,176
18-02-09	Christian Outreach Appeal	515 East 3rd Street Long Beach, CA 90802	To continue to support and expand the Senior Programs that help low-income, frail older adults to remain independent and living in their homes	February 11, 2019	$	3,000
18-02-10	Help of Ojai	111 W Santa Ana St P O Box 621 Ojai, CA 93024	To support the Isolated Senior Program, which serves those 80 years and older	January 9, 2019	$	27,000
18-02-10	Help of Ojai	111 W Santa Ana St P O Box 621 Ojai, CA 93024	To support the Isolated Senior Program, which serves those 80 years and older	April 8, 2019	$	3,000
18-02-11	Regents of the University of California, Los Angeles	Box 957089, 1125 Murphy Hall 405 Hilgard Avenue Los Angeles, CA 90095-9000	To support the inclusion of a module on family caregiving in the 2019-2020 California Health Interview Survey (CHIS)	January 9, 2019	$	179,819
18-02-11	Regents of the University of California, Los Angeles	Box 957089, 1125 Murphy Hall 405 Hilgard Avenue Los Angeles, CA 90095-9000	To support the inclusion of a module on family caregiving in the 2019-2020 California Health Interview Survey (CHIS)	March 26, 2019	$	5,951
18-02-12	University of Southern California	Department of Contracts and Grants 3720 S Flower St , CUB 303 Los Angeles, CA 90089-0701	To implement the third phase of the ReFraming Elder Abuse project Phase III specifically will facilitate the dissemination of a national evidence-based communication strategy that frames elder abuse as a justice issue.	January 9, 2019	$	129,944
18-02-12	University of Southern California	Department of Contracts and Grants 3720 S Flower St , CUB 303 Los Angeles, CA 90089-0701	To implement the third phase of the ReFraming Elder Abuse project Phase III specifically will facilitate the dissemination of a national evidence-based communication strategy that frames elder abuse as a justice issue.	April 8, 2019	$	15,460

18-03-13	Rebuilding Together Mountain Communities	P O Box 3540 Blue Jay, CA 92317	To support Rebuilding Day 2018 and Emergency Home Repairs in the San Bernardino Mountain communities	July 11, 2018	$ 1,500
18-03-14	Project Open Hand	730 Polk Street San Francisco, CA 94109	To support the launch of the first-in-the-nation, Medi-Cal Medically Tailored Meals Pilot Program to address the nutritional needs of California's most vulnerable, critically ill, and high-health care utilizers.	April 10, 2019	$ 205,945
18-03-14	Project Open Hand	730 Polk Street San Francisco, CA 94109	To support the launch of the first-in-the-nation, Medi-Cal Medically Tailored Meals Pilot Program to address the nutritional needs of California's most vulnerable, critically ill, and high-health care utilizers	June 20, 2019	$ 22,883
18-03-15	California Food Policy Advocates	1970 Broadway, Suite 760 Oakland, CA 94612	To support the activities to newly enroll up to 50,000 low-income older adults (60 and older) into food assistance through CalFresh at higher average benefit levels than those enrolled prior to the inception of the project.	April 10, 2019	$ 108,900
18-03-15	California Food Policy Advocates	1970 Broadway, Suite 760 Oakland, CA 94612	To support the activities to newly enroll up to 50,000 low-income older adults (60 and older) into food assistance through CalFresh at higher average benefit levels than those enrolled prior to the inception of the project.	June 26, 2019	$ 15,500
18-03-17	Catholic Charities of Los Angeles, Inc	21600 Hart Street Canoga Park, CA 91303	To support the expansion of the Older Adult Services & Intervention System (OASIS) program to ensure that older people receive social services and preventative care necessary to maintain independence.	April 8, 2019	$ 44,524
18-03-17	Catholic Charities of Los Angeles, Inc	21600 Hart Street Canoga Park, CA 91303	To support the expansion of the Older Adult Services & Intervention System (OASIS) program to ensure that older people receive social services and preventative care necessary to maintain independence	June 20, 2019	$ 5,000
18-03-18	Pathways Volunteer Hospice	4645 Woodruff Ave Lakewood, CA 90713	To support the Care Navigation Program Collaboration, a new model of care designed Meals on Wheels of Long Beach, and CSULB, School of Nursing to help up to 300 vulnerable homebound older adults annually live as safely and	April 10, 2019	$ 113,359
18-03-18	Pathways Volunteer Hospice	4645 Woodruff Ave Lakewood, CA 90713	To support the Care Navigation Program Collaboration, a new model of care designed Meals on Wheels of Long Beach, and CSULB, School of Nursing to help up to 300 vulnerable homebound older adults annually live as safely and	June 26, 2019	$ 13,242

18-03-19	St Paul's Retirement Homes Foundation	328 Maple Street San Diego, CA 92103	To support nursing case management, dietary services, and in-home assistance during the first two years of operation at its new St Paul's PACE Center located in the East County of San Diego	April 10, 2019	$ 135,000
18-03-19	St Paul's Retirement Homes Foundation	328 Maple Street San Diego, CA 92103	To support nursing case management, dietary services, and in-home assistance during the first two years of operation at its new St Paul's PACE Center located in the East County of San Diego	June 20, 2019	$ 15,000
18-03-20	Rebuilding Together, Long Beach	PO Box 3823 Long Beach, CA 90803	To continue to support Critical Health and Safety Home Repairs for Low Income Seniors	June 20, 2019	$ 5,000
18-03-22	The UCLA Foundation	10920 Wilshire Blvd , Suite 900 Los Angeles, CA 90024	To expand the geriatric and gerontology program and workforce development efforts at the University of California, Los Angeles	April 10, 2019	$ 90,000
18-03-22	The UCLA Foundation	10920 Wilshire Blvd , Suite 900 Los Angeles, CA 90024	To expand the geriatric and gerontology program and workforce development efforts at the University of California, Los Angeles	June 20, 2019	$ 10,000
18-03-23	Bet Tzedek	3250 Wilshire Blvd , 13th Floor Los Angeles, CA 90010	To support the expansion of the Family Caregiver Project	April 8, 2019	$ 157,500
18-03-23	Bet Tzedek	3250 Wilshire Blvd , 13th Floor Los Angeles, CA 90010	To support the expansion of the Family Caregiver Project	June 20, 2019	$ 17,500
18-03-25	Alzheimers Family Services Center	9451 Indianapolis Avenue Huntington Beach, CA 92646	To support the Adult Evening Health Services & Caregiver Counseling programs	April 8, 2019	$ 90,000
18-03-25	Alzheimers Family Services Center	9451 Indianapolis Avenue Huntington Beach, CA 92646	To support the Adult Evening Health Services & Caregiver Counseling programs	June 10, 2019	$ 10,000

18-03-26	Alzheimer's Orange County	2515 McCabe Way, Suite 200 Irvine, CA 92614	To support the implementation of program enhancements to its Adult Day and Health Care facilities to better serve and support family caregivers of older adults	April 8, 2019	$	90,000
18-03-26	Alzheimer's Orange County	2515 McCabe Way, Suite 200 Irvine, CA 92614	To support the implementation of program enhancements to its Adult Day and Health Care facilities to better serve and support family caregivers of older adults	June 26, 2019	$	10,000
18-03-27	ONEgeneration	17400 Victory Blvd Van Nuys, CA 91406	To provide Adult Day Health Care and Adult Day Care program services to its program participants, which provide an important source of respite for family caregivers providing care for frail older adults with complex health issues.	April 4, 2019	$	90,000
18-03-27	ONEgeneration	17400 Victory Blvd Van Nuys, CA 91406	To provide Adult Day Health Care and Adult Day Care program services to its program participants, which provide an important source of respite for family caregivers providing care for frail older adults with complex health issues.	June 10, 2019	$	10,000
18-03-28	OPICA Adult Day Program and Counsel	11759 Missouri Ave Los Angeles, CA 90025	To support comprehensive programming to support family caregivers of older adults through the Adult Day Services program	May 1, 2019	$	90,000
18-03-28	OPICA Adult Day Program and Counsel	11759 Missouri Ave Los Angeles, CA 90025	To support comprehensive programming to support family caregivers of older adults through the Adult Day Services program	June 20, 2019	$	10,000
18-03-29	Community SeniorServ, Inc	1200 N Knollwood Circle Anaheim, CA 92801	To integrate evidence-based caregiver support services into their Adult Day Services (ADS) programs	April 8, 2019	$	90,000
18-03-29	Community SeniorServ, Inc	1200 N Knollwood Circle Anaheim, CA 92801	To integrate evidence-based caregiver support services into their Adult Day Services (ADS) programs	June 10, 2019	$	10,000
18-04-33	Kaiser Foundation Hospitals	c/o Kaiser Foundation Research Institute 1800 Harrison Street, 16th Floor Oakland, CA 94612	To support the Care Partners Bridging Families, Clinics, and Communities to Advance Late-Life Depression Care - Enhanced Depression Care Management Project, in partnership with Healthy African American Families.	December 10, 2018	$	134,986

18-04-35	Regents of the University of California, Davis	UC Davis Department of Psychiatry 2230 Stockton Blvd , 2nd Floor Sacramento, CA 95817	To support the Care Partners Bridging Families, Clinics, and Communities to Advance Late-Life Depression Care - Family Partnership project, in partnership with the 13-clinic UC Davis Primary Care Network.	July 11, 2018	$	134,999
19-01-01	Abilityfirst	1300 East Green Street Pasadena, CA 91106	To support the Warm Water Aquatics Program, providing therapeutic and recreational opportunities for more than 260 older adults from Long Beach and surrounding communities	August 28, 2018	$	13,500
19-01-02	Center for Oral Health	309 East 2nd Street Pomona, CA 91766	To improve access and to increase awareness of the oral health needs of older adults and advance policy changes that improve the oral health care system for all older adults	August 28, 2018	$	13,500
19-01-03	Somang Society	5836 Corporate Avenue, Suite 110 Cypress, CA 90630	To support and initiate a Dementia Education and Support program for Korean American Family Caregivers in Orange County, California	August 28, 2018	$	13,500
19-01-04	National Hispanic Council on Aging	2201 12th Street, N W , Suite 101 Washington, DC 20009	To support a three-day California regional conference, entitled "Building Bridges to Engage Diverse Communities" to be held on August 28 - 30, 2018, at the California Endowment	August 28, 2018	$	9,000
19-01-05	Regents of the University of California, Los Angeles	UCLA/Office of Contract and Grant Administration 10889 Wilshire Blvd , Suite 700 Los Angeles, CA 90095	To support Phase II of the Improving Caregiving for Dementia (I-CareD) project, which will further develop, adapt, and disseminate the I-CareD project	May 23, 2019	$	67,500
19-01-06	Regents of the University of California, San Francisco	PO Box 748872 Los Angeles, CA 90074-4872	To support the Improving Supportive Care for Family Caregivers of Patients with Serious Illness project through the Palliative Care Quality Network	November 2, 2018	$	81,000
19-02-07	Conejo Free Clinic	80 E Hillcrest Drive, Suite 102 Thousand Oaks, CA 91360	To support Conejo Free Clinic's Dental Clinic and its Senior Dentistry Program in providing specialized dentistry for 100 older adults, free of charge	November 28, 2018	$	13,500
19-02-08	Hunger Action Los Angeles	961 S Mariposa, #205 Los Angeles, CA 90006	To support the Supplemental Security Income (SSI) Cash Out project	December 19, 2018	$	23,728

19-02-09	The Los Angeles LGBT Center	1125 N McCadden Place Los Angeles, CA 90038-1212	To support the LGBT Seniors and Caregivers Program	December 19, 2018	$	22,500
19-03-10	St Barnabas Senior Center Of Los Angeles	675 S Carondelet St Los Angeles, CA 90057-3309	To support the 10th Annual Summit on Aging hosted by the Los Angeles Aging Advocacy Coalition on June 6, 2019	March 26, 2019	$	13,500
19-03-11	St Barnabas Senior Center Of Los Angeles	675 S Carondelet St Los Angeles, CA 90057-3309	To support the Aging into the Future Transforming Lives through Technology & Innovation Conference on April 6, 2019	March 26, 2019	$	13,500
19-03-11	St Barnabas Senior Center Of Los Angeles	675 S Carondelet St Los Angeles, CA 90057-3309	To support the Aging into the Future Transforming Lives through Technology & Innovation Conference on April 6, 2019	June 20, 2019	$	1,500
19-03-12	Regents of the University of California, San Francisco	3333 California St , Suite 340San Francisco, CA 94118	To examine the impact of CalFresh benefits on health outcomes among low-income older adults who receive Supplemental Security Income (SSI) benefits	May 1, 2019	$	194,076
19-03-13	The Gerontological Society of America	1220 L Street, NW, Suite 901 Washington, DC 20005-4018	To support the ReFraming Aging Initiative	April 24, 2019	$	54,000
19-04-14	Rebuilding Together Mountain Communities	P O Box 3540 Blue Jay, CA 92317	To support Rebuilding Day 2020 and Emergency Home Repairs	June 10, 2019	$	13,500

Total Grants Paid FY 2019 $ 4,163,746

Archstone Foundation
FYE 6/30/19

Attachment C
Form 990 PF, PART XV, LINE 3B

ARCHSTONE FOUNDATION
Grants Payable in FY 2020

Grant Number	Name of Organization	Mailing Address	Grant Purpose	Schedule Payment Date	Amount
19-01-01	Abilityfirst	1300 East Green Street Pasadena, CA 91106	To support the Warm Water Aquatics Program, providing therapeutic and recreational opportunities for more than 260 older adults from Long Beach and surrounding communities	11/15/2019	$15,000 00
19-01-02	Center for Oral Health	309 East 2nd Street Pomona, CA 91766	To improve access and to increase awareness of the oral health needs of older adults and advance policy changes that improve the oral health care system for all older adults	11/15/2019	$15,000 00
19-01-03	Somang Society	5836 Corporate Avenue, Suite 110 Cypress, CA 90630	To support and initiate a Dementia Education and Support program for Korean American Family Caregivers in Orange County, California	11/15/2019	$15,000 00
19-01-04	National Hispanic Council on Aging	2201 12th Street, N W , Suite 101 Washington, DC 20009	To support a three-day California regional conference, entitled "Building Bridges to Engage Diverse Communities" to be held on August 28 - 30, 2018, at the California Endowment	11/15/2019	$10,000 00
19-01-05	Regents of the University of California, Los Angeles	UCLA/Office of Contract and Grant Administration 10889 Wilshire Blvd , Suite 700 Los Angeles, CA 90095	To support Phase II of the Improving Caregiving for Dementia (I-CareD) project, which will further develop, adapt, and disseminate the I-CareD project	12/15/2019	$200,000 00
19-01-06	Regents of the University of California, San Francisco	PO Box 748872 Los Angeles, CA 90074-4872	To support the Improving Supportive Care for Family Caregivers of Patients with Serious Illness project through the Palliative Care Quality Network	12/15/2019	$270,000.00
19-02-07	Conejo Free Clinic	80 E Hillcrest Drive, Suite 102 Thousand Oaks, CA 91360	To support Conejo Free Clinic's Dental Clinic and its Senior Dentistry Program in providing specialized dentistry for 100 older adults, free of charge.	2/15/2020	$15,000 00
19-02-08	Hunger Action Los Angeles	961 S Mariposa, #205 Los Angeles, CA 90006	To support the Supplemental Security Income (SSI) Cash Out project.	3/15/2020	$26,364 00

ARCHSTONE FOUNDATION
Grants Payable in FY 2020

19-02-09	The Los Angeles LGBT Center	1125 N McCadden Place Los Angeles, CA 90038-1212	To support the LGBT Seniors and Caregivers Program	3/15/2020	$25,000 00
19-03-10	St Barnabas Senior Center Of Los Angeles	675 S Carondelet St Los Angeles, CA 90057-3309	To support the 10th Annual Summit on Aging hosted by the Los Angeles Aging Advocacy Coalition on June 6, 2019	10/15/2019	$15,000 00
19-03-12	Regents of the University of California, San Francisco	3333 California St , Suite 340San Francisco, CA 94118	To examine the impact of CalFresh benefits on health outcomes among low-income older adults who receive Supplemental Security Income (SSI) benefits	6/15/2020	$399,793 00
19-03-13	The Gerontological Society of America	1220 L Street, NW, Suite 901 Washington, DC 20005-4018	To support the ReFraming Aging Initiative	6/15/2020	$160,000 00
19-04-15	Grantmakers In Aging, Inc	Lumix CPAs and Advisors 8401 Connecticut Ave #1202 Chevy Chase, MD 20815	To support organizational development and core programmatic activities	7/1/2019	$480,000 00

Total Grants Payable FY 2019 $ 1,646,157