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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018, or tax year beginning 07-01-2018, and ending 06-30-2019

Name of foundation
THE MCCUNE FOUNDATION

A Employer identification number
77-0242953

Number and street (or P O box number if mail is not delivered to street address)
PO BOX 24340

Room/suite

B Telephone number (see instructions)
(805) 223-8373

City or town, state or province, country, and ZIP or foreign postal code
VENTURA, CA 93002

C If exemption application is pending, check here

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

H Check type of organization

Section 501(c)(3) exempt private foundation

Section 4947(a)(1) nonexempt charitable trust

Other taxable private foundation

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 2,349,272

J Accounting method

Cash

Accrual

Other (specify)

(Part I, column (d) must be on cash basis)

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

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

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	1,001,000		
	2 Check ☐ if the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments	14,138	14,138	
	4 Dividends and interest from securities	24,044	24,044	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	965		
	b Gross sales price for all assets on line 6a 59,079			
	7 Capital gain net income (from Part IV, line 2)		965	
	8 Net short-term capital gain			
	9 Income modifications			
	10a Gross sales less returns and allowances			
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	1,040,147	39,147		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	109,232	0	109,232
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits	21,473	0	21,473
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	9,915	4,957	4,958
	c Other professional fees (attach schedule)	47,869	19,411	28,458
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	9,419	0	8,788
	19 Depreciation (attach schedule) and depletion	4,146	0	
	20 Occupancy	7,580	0	7,580
	21 Travel, conferences, and meetings			
	22 Printing and publications	2,644	0	2,644
	23 Other expenses (attach schedule)	25,116	0	25,116
	24 Total operating and administrative expenses. Add lines 13 through 23	237,394	24,368	208,249
	25 Contributions, gifts, grants paid	779,605		779,605
	26 Total expenses and disbursements. Add lines 24 and 25	1,016,999	24,368	987,854
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	23,148		
	b Net investment income (if negative, enter -0-)		14,779	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2018)

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	147,136	155,687	155,687
	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 schedule) ▶ _____ 100,000 Less allowance for doubtful accounts ▶ _____ 0	100,000	100,000	100,000
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	498		
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	990,986	981,950	1,352,715
	c Investments—corporate bonds (attach schedule)	663,285	660,100	657,669
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	43,239	74,986	74,986
	14 Land, buildings, and equipment basis ▶ _____ 20,927 Less accumulated depreciation (attach schedule) ▶ _____ 12,712	12,361	8,215	8,215
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,957,505	1,980,938	2,349,272	
Liabilities	17 Accounts payable and accrued expenses	3,309	3,285	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule).			
	22 Other liabilities (describe ▶ _____)	530	839	
	23 Total liabilities (add lines 17 through 22)	3,839	4,124	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	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	1,953,666	1,976,814	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	0	0	
	30 Total net assets or fund balances (see instructions)	1,953,666	1,976,814	
31 Total liabilities and net assets/fund balances (see instructions) .	1,957,505	1,980,938		

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	1,953,666
2 Enter amount from Part I, line 27a	2	23,148
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	1,976,814
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	1,976,814

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a US BANK	P		
b GAIN ON PRAXAIR INC MERGER	P		
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 42,733		45,851	-3,118
b 16,346		12,263	4,083
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			-3,118
b			4,083
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	965
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017	1,009,680	2,048,010	0.493005
2016	1,121,937	1,922,038	0.583723
2015	1,062,325	1,801,914	0.589554
2014	1,031,574	1,803,672	0.571930
2013	998,255	1,774,799	0.562461

2 Total of line 1, column (d)	2	2.800673
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	0.560135
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	2,346,602
5 Multiply line 4 by line 3	5	1,314,414
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	148
7 Add lines 5 and 6	7	1,314,562
8 Enter qualifying distributions from Part XII, line 4	8	987,854

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	296
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	296
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	296
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	163
b	Exempt foreign organizations—tax withheld at source	6b	
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	163
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	133
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 2019 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ 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? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>MCCUNEFUNDATION.ORG</u>	13	Yes	
14	The books are in care of ► <u>CLAUDIA ARMANN</u> Telephone no ► <u>(805) 223-8373</u>			

Located at ► 700 E MAIN ST VENTURA CA ZIP+4 ► 93001

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ► ☐			
	and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16	At any time during calendar year 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	Yes	No
	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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 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 ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

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.	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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	☐ Yes ☐ No	
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? If "Yes" to 6b, file Form 8870	6b	No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b	
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 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, 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
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(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	
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	
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	2,130,925
b	Average of monthly cash balances.	1b	151,412
c	Fair market value of all other assets (see instructions).	1c	100,000
d	Total (add lines 1a, b, and c).	1d	2,382,337
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	2,382,337
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	35,735
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	2,346,602
6	Minimum investment return. Enter 5% of line 5.	6	117,330

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	117,330
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	296
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	296
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	117,034
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	117,034
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	117,034

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	987,854
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	987,854
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	987,854

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				117,034
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.	909,970			
b From 2014.	943,415			
c From 2015.	984,917			
d From 2016.	401,656			
e From 2017.	907,614			
f Total of lines 3a through e.	4,147,572			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 987,854				
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.				117,034
e Remaining amount distributed out of corpus	870,820			
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	5,018,392			
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 instructions			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 (see instructions).	909,970			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	4,108,422			
10 Analysis of line 9				
a Excess from 2014.	943,415			
b Excess from 2015.	984,917			
c Excess from 2016.	401,656			
d Excess from 2017.	907,614			
e Excess from 2018.	870,820			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. ▶

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
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))
SARA MILLER MCCUNE

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed
CLAUDIA ARMANN
PO BOX 24340
VENTURA, CA 93002
(805) 223-8373

b The form in which applications should be submitted and information and materials they should include
TWO-PAGE LETTER OF INQUIRY AND COPY OF IRS TAX-EXEMPT STATUS LETTER

c Any submission deadlines
JANUARY AND JULY

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
GRANTS ARE LIMITED TO ORGANIZATIONS WITH 501(C)3 STATUS OPERATING IN SANTA BARBARA AND VENTURA COUNTIES, CALIFORNIA AND AREAS OF INTEREST TO THE BOARD. GRANTS ARE MADE FOR PROJECTS THAT MOBILIZE RESIDENTS FOR ECONOMIC AND SOCIAL JUSTICE INITIATIVES

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2018)

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

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

[illegible]

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

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.		
	*****	2019-10-23	*****
	_____ Signature of officer or trustee	_____ Date	_____ Title

May the IRS discuss this return with the preparer shown below?
 (see instr.)? ☒ **Yes** ☐ **No**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01255292
	VANESSA M GARCIA				
	Firm's name ▶ MACFARLANE FALETTI & CO LLP Firm's address ▶ 115 E MICHELTORENA ST 200 SANTA BARBARA, CA 93101				
					Firm's EIN ▶ 95-2835976 Phone no (805) 966-4157

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
CLAUDIA Z ARMANN	EXECUTIVE DIRECTOR 35 00	109,232	21,473	0
700 E MAIN ST VENTURA, CA 93001				
SARA MILLER MCCUNE	PRESIDENT 4 00	0	0	0
700 E MAIN ST VENTURA, CA 93001				
SANDRA BALL-ROKEACH	VICE-PRESIDENT 1 00	0	0	0
700 E MAIN ST VENTURA, CA 93001				
VICKI FISHER MAGASINN	SECRETARY 1 00	0	0	0
700 E MAIN ST VENTURA, CA 93001				
HILDA ZACARIAS	TREASURER 2 00	0	0	0
700 E MAIN ST VENTURA, CA 93001				
MARCOS VARGAS	DIRECTOR 1 50	0	0	0
700 E MAIN ST VENTURA, CA 93001				
SUSAN ROSE	DIRECTOR 1 00	0	0	0
700 E MAIN ST VENTURA, CA 93001				
DAVID MCCUNE	DIRECTOR 1 00	0	0	0
700 E MAIN ST VENTURA, CA 93001				
VICTOR RIOS	DIRECTOR 1 00	0	0	0
700 E MAIN ST VENTURA, CA 93001				
CHARLES HALE	DIRECTOR 1 00	0	0	0
700 E MAIN ST VENTURA, CA 93001				
MONIQUE LIMON	DIRECTOR 1 00	0	0	0
700 E MAIN ST VENTURA, CA 93001				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ADSUM EDUCATION FOUNDATION PO BOX 90710 SANTA BARBARA, CA 93190	NONE	501(C)3	GENERAL SUPPORT	1,000
ALLIANCE FOR GLOBAL JUSTICE 199 W HILLCREST DR THOSAND OAKS, CA 91360	NONE	501(C)3	BUEN VECINO	2,000
ALLIANCE FOR GLOBAL JUSTICE 199 W HILLCREST DR THOSAND OAKS, CA 91360	NONE	501(C)3	IMMIGRANT EMPOWERMENT	6,000
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALLIANCE FOR PHARMACEUTICAL ACCESS INC 221 TOWN CENTER WEST 122 SANTA MARIA, CA 93458	NONE	501(C)3	GENERAL SUPPORT	1,000
ALPHA RESOURCE CENTER OF SANTA BARBARA 4501 CATHEDRAL OAKS RD SANTA BARBARA, CA 93110	NONE	501(C)3	FAMILY VOICES SUMMIT	3,500
ALTERNATIVES TO VIOLENCE PO BOX 3294 SANTA BARBARA, CA 93130	NONE	501(C)3	WORKSHOP FOOD AND INTERPRETATION	1,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CALIFORNIA LUTHERAN UNIVERSITY 60 W OLSEN RD 4400 THOUSAND OAKS, CA 91360	NONE	501(C)3	CENTER FOR NONPROFIT LEADERSHIP	17,500
CANCER SUPPORT COMMUNITY VALLEY VENTURA SANTA BARBARA 530 HAMPSHIRE RD WESTLAKE VILLAGE, CA 91361	NONE	501(C)3	GENERAL SUPPORT	2,500
CARPINTERIA ARTS COUNCIL 855 LINDEN AVE CARPINTERIA, CA 93013	NONE	501(C)3	FACING OURSELVES EXHIBIT	1,000
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CAUSE (CENTRAL COAST ALLIANCE UNITED FOR A SUSTAINABLE ECONOMY) 2021 SPERRY AVE STE 9 VENTURA, CA 93003	NONE	501(C)3	RAISING JUSTICE FUNDRAISER	950
CAUSE (CENTRAL COAST ALLIANCE UNITED FOR A SUSTAINABLE ECONOMY) 2021 SPERRY AVE STE 9 VENTURA, CA 93003	NONE	501(C)3	RAISING JUSTICE FUNDRAISER	1,000
CAUSE (CENTRAL COAST ALLIANCE UNITED FOR A SUSTAINABLE ECONOMY) 2021 SPERRY AVE STE 9 VENTURA, CA 93003	NONE	501(C)3	RAISING JUSTICE FUNDRAISER	1,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CAUSE (CENTRAL COAST ALLIANCE UNITED FOR A SUSTAINABLE ECONOMY) 2021 SPERRY AVE STE 9 VENTURA, CA 93003	NONE	501(C)3	BUILDING LEADERSHIP AND ORGANIZING IN OUR NEIGHBORHOODS	40,000
CAUSE (CENTRAL COAST ALLIANCE UNITED FOR A SUSTAINABLE ECONOMY) 2021 SPERRY AVE STE 9 VENTURA, CA 93003	NONE	501(C)3	GENERAL SUPPORT	1,250
CAUSE (CENTRAL COAST ALLIANCE UNITED FOR A SUSTAINABLE ECONOMY) 2021 SPERRY AVE STE 9 VENTURA, CA 93003	NONE	501(C)3	CLIMATE JUSTICE NETWORK TRAINING	4,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CAUSE (CENTRAL COAST ALLIANCE UNITED FOR A SUSTAINABLE ECONOMY) 2021 SPERRY AVE STE 9 VENTURA, CA 93003	NONE	501(C)3	GENERAL SUPPORT	35,000
CITIZENS FOR RESPONSIBLE OIL & GAS PO BOX 114 OJAI, CA 93024	NONE	501(C)3	MIDWEST ACADEMY TRAINING	3,064
COALITION FOR SUSTAINABLE TRANSPORTATION PO BOX 2495 SANTA BARBARA, CA 93120	NONE	501(C)3	EASTSIDE NEIGHBORHOOD COUNCIL /TRANSIT AND PEDESTRIAN ORGANIZING	20,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
COALITION FOR SUSTAINABLE TRANSPORTATION PO BOX 2495 SANTA BARBARA, CA 93120	NONE	501(C)3	LEADING FROM WITHIN REGISTRATION	2,700
COMMUNITY ACTION COMMISSION 5638 HOLLISTER AVE STE 230 GOLETA, CA 93117	NONE	501(C)3	SENIOR NUTRITION PROGRAM	1,000
COMMUNITY ADVOCACY COALITION OF VENTURA 4000 S ROSE AVENUE OXNARD, CA 93033	NONE	501(C)3	GENERAL SUPPORT	500
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
COMMUNITY ADVOCACY COALITION OF VENTURA 4000 S ROSE AVENUE OXNARD, CA 93033	NONE	501(C)3	RADIO STATION	500
COMMUNITY WATER CENTER 900 W OAK AVE VISALIA, CA 93291	NONE	501(C)3	GENERAL SUPPORT	500
COUNCIL ON AMERICAN-ISLAMIC RELATIONS 2180 W CRESCENT AVE STE F ANAHEIM, CA 92801	NONE	501(C)3	MENTAL HEALTH AND SAFETY TRAINING	1,500
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CUYAMA VALLEY FAMILY RESOURCE CENTER PO BOX 5 CUYAMA, CA 93254	NONE	501(C)3	LATINO ENGAGEMENT INITIATIVE	20,000
DIVERSITY COLLECTIVE VENTURA COUNTY 2471 PORTOLA ROAD SUITE 100 VENTURA, CA 93003	NONE	501(C)3	LGBTQ ADVOCACY IN VENTURA COUNTY	15,000
DIVERSITY COLLECTIVE VENTURA COUNTY 2471 PORTOLA ROAD SUITE 100 VENTURA, CA 93003	NONE	501(C)3	GENERAL SUPPORT	500
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DOCTORS WITHOUT BORDERS USA 40 RECTOR ST 16TH NEW YORK, NY 10006	NONE	501(C)3	GENERAL SUPPORT	2,500
DOS PUEBLOS ENGINEERING ACADEMY 7266 ALHAMBRA AVE GOLETA, CA 93117	NONE	501(C)3	GENERAL SUPPORT	1,500
ENCAMPMENT FOR CITIZENSHIP PO BOX 1210 APTOS, CA 95001	NONE	501(C)3	SUMMER YOUTH PROGRAM	2,736
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FAMILIES ACTPO BOX 2152 SANTA BARBARA, CA 93120	NONE	501(C)3	BEDS NOT CELLS	25,000
FOOD AND WATER WATCH 155 GRAND AVE STE 905 OAKLAND, CA 94612	NONE	501(C)3	COMMUNITY ORGANIZING	25,000
FUND FOR SANTA BARBARA 26 W ANAPAMU STE 100 SANTA BARBARA, CA 93101	NONE	501(C)3	SANTA BARBARA GIVES	5,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
FUND FOR SANTA BARBARA 26 W ANAPAMU STE 100 SANTA BARBARA, CA 93101	NONE	501(C)3	NONPROFIT RESOURCE NETWORK	3,000
FUND FOR SANTA BARBARA 26 W ANAPAMU STE 100 SANTA BARBARA, CA 93101	NONE	501(C)3	YOUTH MAKING CHANGE	1,000
FUND FOR SANTA BARBARA 26 W ANAPAMU STE 100 SANTA BARBARA, CA 93101	NONE	501(C)3	TECHNICAL ASSISTANCE PROGRAM	25,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FUTURE LEADERS OF AMERICA PO BOX 51637 OXNARD, CA 93031	NONE	501(C)3	REENCUENTRO SPONSORSHIP	425
FUTURE LEADERS OF AMERICA PO BOX 51637 OXNARD, CA 93031	NONE	501(C)3	YOUTH LEADERSHIP AND ADVOCACY PROGRAMS	35,000
FUTURE LEADERS OF AMERICA PO BOX 51637 OXNARD, CA 93031	NONE	501(C)3	MIDWEST ACADEMY TRAINING	4,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FUTURE LEADERS OF AMERICA PO BOX 51637 OXNARD, CA 93031	NONE	501(C)3	LATINO LEGACY AWARDS	1,000
FUTURE LEADERS OF AMERICA PO BOX 51637 OXNARD, CA 93031	NONE	501(C)3	GENERAL SUPPORT	37,500
FUTURE LEADERS OF AMERICA PO BOX 51637 OXNARD, CA 93031	NONE	501(C)3	SANTA MARIA/ LOMPOC CAMP	1,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GEFFEN PLAYHOUSE INC 10886 LE CONTE AVE LOS ANGELES, CA 90024	NONE	501(C)3	GENERAL SUPPORT	3,000
HISPANICS IN PHILANTHROPY 414 13TH ST SUITE 200 OAKLAND, CA 94612	NONE	501(C)3	805 UNDOCUFUND	500
HOUSE OF PRIDE AND EQUALITY 518 N OAKLEY AVE SANTA BARBARA, CA 93458	NONE	501(C)3	SANTA MARIA WOMEN'S MARCH	500
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JUST COMMUNITIES CENTRAL COAST 1528 CHAPALA ST STE 308 SANTA BARBARA, CA 93101	NONE	501(C)3	LAWSUIT-RELATED COSTS	3,000
JUST COMMUNITIES CENTRAL COAST 1528 CHAPALA ST STE 308 SANTA BARBARA, CA 93101	NONE	501(C)3	IMMIGRATION CONFERENCE	500
JUST COMMUNITIES CENTRAL COAST 1528 CHAPALA ST STE 308 SANTA BARBARA, CA 93101	NONE	501(C)3	GENERAL SUPPORT	40,000
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JUST COMMUNITIES CENTRAL COAST 1528 CHAPALA ST STE 308 SANTA BARBARA, CA 93101	NONE	501(C)3	LAWSUIT-RELATED COSTS	1,000
JUST COMMUNITIES CENTRAL COAST 1528 CHAPALA ST STE 308 SANTA BARBARA, CA 93101	NONE	501(C)3	GENERAL SUPPORT	1,250
JUST COMMUNITIES CENTRAL COAST 1528 CHAPALA ST STE 308 SANTA BARBARA, CA 93101	NONE	501(C)3	GENERAL SUPPORT	500
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LA CASA DE LA RAZA 601 E MONTECITO ST SANTA BARBARA, CA 93103	NONE	501(C)3	GENERAL SUPPORT	1,500
LA CASA DE LA RAZA 601 E MONTECITO ST SANTA BARBARA, CA 93103	NONE	501(C)3	ED TRANSITION COSTS	1,250
LA CASA DE LA RAZA 601 E MONTECITO ST SANTA BARBARA, CA 93103	NONE	501(C)3	ED TRANSITION COSTS	4,500
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LA HERMANDAD HANK LACAYO YOUTH & FAMILY CENTER 534 SOUTH A ST OXNARD, CA 93030	NONE	501(C)3	GENERAL SUPPORT	2,000
LEADING FROM WITHINPO BOX 806 SANTA BARBARA, CA 93102	NONE	501(C)3	GENERAL SUPPORT	1,000
LEADING FROM WITHINPO BOX 806 SANTA BARBARA, CA 93102	NONE	501(C)3	LEADING FOR COMMUNITY IMPACT	10,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LUCHA632 W GUAVA OXNARD, CA 93033	NONE	501(C)3	OXNARD POWWOW	1,000
MANY MANSIONS 1459 E THOUSAND OAKS BLVD STE D THOUSAND OAKS, CA 91362	NONE	501(C)3	VULNERABLE POPULATIONS HOUSING ADVOCACY NETWORK	1,000
MIXTECOINDIGENA COMMUNITY ORGANIZING PROJECT PO BOX 20543 OXNARD, CA 93034	NONE	501(C)3	NIGHT IN OAXACA SPONSORSHIP	675
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MIXTECOINDIGENA COMMUNITY ORGANIZING PROJECT PO BOX 20543 OXNARD, CA 93034	NONE	501(C)3	INDIGENOUS KNOWLEDGE CONFERENCE	500
MIXTECOINDIGENA COMMUNITY ORGANIZING PROJECT PO BOX 20543 OXNARD, CA 93034	NONE	501(C)3	JUSTICIA LABORAL PROJECT	35,000
NEW BEGINNINGS COUNSELING CENTER 324 E CARRILLO ST STE C SANTA BARBARA, CA 93101	NONE	501(C)3	HOMELESSNESS CONFERENCE	2,500
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ONE COMMUNITY ACTION 2226 SIGNAL ST SANTA MARIA, CA 93458	NONE	501(C)3	GENERAL SUPPORT	1,000
ONE STEP A LA VEZPO BOX 192 FILLMORE, CA 93016	NONE	501(C)3	ONE STEP ADELANTE	30,000
ORGANIZACION EN CALIFORNIA DE LIDERES CAMPESINAS PO BOX 20033 OXNARD, CA 93034	NONE	501(C)3	ADDRESSING & PREVENTING SEXUAL VIOLENCE IN THE WORKPLACE	20,000
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ORGANIZACION EN CALIFORNIA DE LIDERES CAMPESINAS PO BOX 20033 OXNARD, CA 93034	NONE	501(C)3	CENSUS TRAINING	70
PACIFIC PRIDE FOUNDATION 608 ANACAPA ST SUITE A SANTA BARBARA, CA 93101	NONE	501(C)3	LGBTQ+ ADVOCACY PROGRAMS	20,000
PACIFIC PRIDE FOUNDATION 608 ANACAPA ST SUITE A SANTA BARBARA, CA 93101	NONE	501(C)3	GENERAL SUPPORT	500
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PEOPLES' SELF-HELP HOUSING 3533 EMPLEO ST SAN LUIS OBISPO, CA 93401	NONE	501(C)3	RESIDENT EMPOWERMENT PROJECT	20,000
SANTA BARBARA BICYCLE COALITION PO BOX 92047 SANTA BARBARA, CA 93190	NONE	501(C)3	PUBLIC ENGAGEMENT FOR SAFER BICYCLING	25,000
SANTA BARBARA COUNTY IMMIGRANT LEGAL DEFENSE CENTER 120 E JONES ST STE 117 SANTA MARIA, CA 93454	NONE	501(C)3	SANTA BARBARA COUNTY IMMIGRANT LEGAL DEFENSE CENTER	20,000
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SANTA BARBARA COUNTY IMMIGRANT LEGAL DEFENSE CENTER 120 E JONES ST STE 117 SANTA MARIA, CA 93454	NONE	501(C)3	GENERAL SUPPORT	2,500
SANTA BARBARA FOUNDATION 1111 CHAPALA STREET SUITE 200 SANTA BARBARA, CA 93101	NONE	501(C)3	GENERAL SUPPORT	250
SANTA BARBARA FOUNDATION 1111 CHAPALA STREET SUITE 200 SANTA BARBARA, CA 93101	NONE	501(C)3	PARTNERSHIP FOR EXCELLENCE CONFERENCE	2,500
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SANTA BARBARA FRIENDS MEETING 2012 CHAPALA ST SANTA BARBARA, CA 93105	NONE	501(C)3	TRUTH IN RECRUITMENT	20,000
SANTA BARBARA LOWER WESTSIDE COMMUNITY CENTER 211 W GUTIERREZ ST UNIT 6 SANTA BARBARA, CA 93101	NONE	501(C)3	ESCUELITA DE EL CENTRO	1,250
SANTA BARBARA RESPONSE NETWORK 115 W CANON PERDIDO SANTA BARBARA, CA 93101	NONE	501(C)3	IMMIGRATION ADVOCACY COLLABORATIVE	5,000
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SAVE THE CHILDREN FEDERATION 501 KINGS HIGHWAY EAST STE 400 FAIRFIELD, CT 06825	NONE	501(C)3	YEMEN CHILDREN'S RELIEF FUND	2,500
SEVEN DANCERS COALITION 352 STATE ROUTE 37 HOGANSBURG, NY 13655	NONE	501(C)3	GENERAL SUPPORT	500
SOUTHERN CALIFORNIA PUBLIC RADIO 474 S RAYMOND AVE PASADENA, CA 91105	NONE	501(C)3	SUPPORT FOR LOS ANGELES REGION RADIO PROGRAMMING	5,000
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE ARC OF VENTURA COUNTY 5103 WALKER ST VENTURA, CA 93003	NONE	501(C)3	THE CO-ADVOCATES OF VENTURA COUNTY	15,000
THE JEWISH FEDERATION COUNCIL OF GREATER LOS ANGELES 6505 WILSHIRE BLVD STE 1000 LOS ANGELES, CA 90048	NONE	501(C)3	GENERAL SUPPORT	2,000
THE LITTLE HOUSE BY THE PARK 4681 11TH ST GUADALUPE, CA 93434	NONE	501(C)3	GUADALUPE COMMUNITY CHANGERS AND GUADALUPE PARENT ACADEMY	30,000
Total ► 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TRANSITIONS-MENTAL HEALTH ASSOCIATION PO BOX 15408 SAN LUIS OBISPO, CA 93406	NONE	501(C)3	LIVED EXPERIENCE ADVOCACY DEVELOPMENT (LEAD)	18,000
UCSB FOUNDATION UNIVERSITY OF CALIFORNIA SANTA BARBARA SANTA BARBARA, CA 93106	NONE	501(C)3	DREAM SCHOLARS FUND	2,000
UCSB FOUNDATION UNIVERSITY OF CALIFORNIA SANTA BARBARA SANTA BARBARA, CA 93106	NONE	501(C)3	GEORGE D MCCUNE DISSERTATION FELLOWSHIP	21,488
Total			3a	779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
VENTURA CLIMATE CARE OPTIONS ORGANIZED LOCALLY 490 N VENTURA AVE VENTURA, CA 93001	NONE	501(C)3	PEDAL PODER YOUTH PROGRAM	12,500
VENTURA COUNTY ARTS COUNCIL 646 COUNTY SQUARE DR STE 154 VENTURA, CA 93003	NONE	501(C)3	MIXTECO CHAPBOOK PUBLICATION	500
VENTURA COUNTY COMMUNITY FOUNDATION 4001 MISSION OAKS BLVD STE O CAMARILLO, CA 93012	NONE	501(C)3	805 UNDOCUFUND	500
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
VENTURA COUNTY COMMUNITY FOUNDATION 4001 MISSION OAKS BLVD STE O CAMARILLO, CA 93012	NONE	501(C)3	GENERAL SUPPORT	500
VENTURA COUNTY COMMUNITY FOUNDATION 4001 MISSION OAKS BLVD STE O CAMARILLO, CA 93012	NONE	501(C)3	TRAVEL COSTS FOR CENSUS MEETING	247
VENTURA COUNTY HOUSING TRUST FUND 360 MOBIL AVE STE 213 A CAMARILLO, CA 93010	NONE	501(C)3	HOUSING OUR FUTURE FUNDRAISER	500
Total ▶ 3a				779,605

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
VENTURA COUNTY HOUSING TRUST FUND 360 MOBIL AVE STE 213 A CAMARILLO, CA 93010	NONE	501(C)3	EVENT SPONSORSHIP	500
WESTMINSTER FREE CLINIC 2673 SAN MIGUEL AVE THOUSAND OAKS, CA 91360	NONE	501(C)3	SALUD (STUDENTS ADVOCATING LIFE-AMPLIFYING DECISIONS)	30,000
WESTMINSTER FREE CLINIC 2673 SAN MIGUEL AVE THOUSAND OAKS, CA 91360	NONE	501(C)3	805 UNDOCUFUND OVERHEAD COSTS	5,000
Total ▶ 3a				779,605

TY 2018 Accounting Fees Schedule**Name:** THE MCCUNE FOUNDATION**EIN:** 77-0242953

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	9,915	4,957		4,958

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2018 Depreciation Schedule

Name: THE MCCUNE FOUNDATION

EIN: 77-0242953

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
COMPUTER	2014-04-24	1,212	1,009	SL	5 000000000000	203	0		
BOARD VIDEO (DOWN PAYMENT 3-1-16 \$8,875)	2016-08-01	19,715	7,557	SL	5 000000000000	3,943	0		

TY 2018 Investments Corporate Bonds Schedule

Name: THE MCCUNE FOUNDATION

EIN: 77-0242953

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
TAXABLE BONDS	660,100	657,669

TY 2018 Investments Corporate Stock Schedule**Name:** THE MCCUNE FOUNDATION**EIN:** 77-0242953**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
STOCK	981,950	1,352,715

TY 2018 Investments - Other Schedule

Name: THE MCCUNE FOUNDATION

EIN: 77-0242953

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MONEY MARKET	AT COST	74,986	74,986

**TY 2018 Land, Etc.
Schedule****Name:** THE MCCUNE FOUNDATION**EIN:** 77-0242953

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER	1,212	1,212	0	
BOARD VIDEO (DOWN PAYMENT 3-1-16 \$8,875)	19,715	11,500	8,215	

TY 2018 Other Expenses Schedule**Name:** THE MCCUNE FOUNDATION**EIN:** 77-0242953**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	3,194	0		3,194
OFFICE	8,013	0		8,013
POSTAGE	946	0		946
DUES & SUBSCRIPTIONS	5,667	0		5,667
WEBSITE	420	0		420
DIRECTOR'S EXPENSE	2,128	0		2,128
SITE VISITS	4,748	0		4,748

TY 2018 Other Liabilities Schedule**Name:** THE MCCUNE FOUNDATION**EIN:** 77-0242953

Description	Beginning of Year - Book Value	End of Year - Book Value
PENSION PAYABLE	530	546
TAXES PAYABLE	0	293

TY 2018 Other Professional Fees Schedule**Name:** THE MCCUNE FOUNDATION**EIN:** 77-0242953

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTING	28,458	0		28,458
INVESTMENT	19,411	19,411		0

TY 2018 Taxes Schedule**Name:** THE MCCUNE FOUNDATION**EIN:** 77-0242953

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	8,468	0		8,468
EXCISE TAX	631	0		0
STATE TAXES	20	0		20
ATTORNEY GENERAL	300	0		300

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Go to <u>www.irs.gov/Form990</u> for the latest information	OMB No 1545-0047 2018
	Name of the organization THE MCCUNE FOUNDATION	Employer identification number 77-0242953

Organization type (check one)

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

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

General Rule

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

Special Rules

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

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

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

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

Name of organization THE MCCUNE FOUNDATION	Employer identification number 77-0242953
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Part I **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	SAGE PUBLICATIONS 2455 TELLER ROAD THOUSAND OAKS, CA 91320	\$ 1,000,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
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		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Employer identification number

77-0242953

Part II	Noncash Property
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Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Name of organization THE MCCUNE FOUNDATION	Employer identification number 77-0242953
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee