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EXTENDED TO NOVEMBER 16, 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.

1912

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation		A Employer identification number
STORM CASTLE FOUNDATION		20-8681172
Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number
2494 SAND HILL ROAD		415-362-5990
City or town, state or province, country, and ZIP or foreign postal code		C If exemption application is pending, check here ▶ ☐
MENLO PARK, CA 94025		

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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 ▶ ☐

H Check type of organization: ☒ 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) ▶$ 23,346,996.

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 ▶ ☐

3/4

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))

	Line	Description	(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	4,158,840.		N/A	
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	8,743.	8,743.		STATEMENT 2
	4	Dividends and interest from securities	219,786.	219,786.		STATEMENT 3
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	658,977.			STATEMENT 1
	b	Gross sales price for all assets on line 6a 6,036,040.				
	7	Capital gain net income (from Part IV, line 2)		4,794,384.		
	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	<3.>	<3.>		STATEMENT 4
	12	Total. Add lines 1 through 11	5,046,343.	5,022,910.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.		0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees				
	b	Accounting fees				
	c	Other professional fees STMT 5	11,122.	11,122.		0.
	17	Interest				
	18	Taxes STMT 6	26,000.	0.		0.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses				
	24	Total operating and administrative expenses. Add lines 13 through 23	37,122.	11,122.		0.
	25	Contributions, gifts, grants paid	991,610.			991,610.
	26	Total expenses and disbursements. Add lines 24 and 25	1,028,732.	11,122.		991,610.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	4,017,611.			
	b	Net investment income (if negative, enter -0-)		5,011,788.		
	c	Adjusted net income (if negative, enter -0-)			N/A	

Internal Revenue Service
Received US Bank - USB
322
NOV 30 2020
Ogden, UT

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923501 12-17-19 LHA For Paperwork Reduction Act Notice, see instructions. Form **990-PF** (2019)

10121112 783820 2516.13 2019.05000 STORM CASTLE FOUNDATION 2516_131

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	2,458,900.	6,177,928.	6,177,928.
	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			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 7	7,947,306.	8,165,440.	11,152,468.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 8	5,007,193.	5,478,327.	6,015,591.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶ STATEMENT 9)	4,507.	1,009.	1,009.
	16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	15,417,906.	19,822,704.	23,346,996.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable	23,500.	11,000.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	23,500.	11,000.	
Net Assets or Fund Balances	**Foundations that follow FASB ASC 958, check here** ▶ ☐ **and complete lines 24, 25, 29, and 30.**			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ **and complete lines 26 through 30.**			
	26 Capital stock, trust principal, or current funds	0.	0.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	15,394,406.	19,811,704.	
	29 **Total net assets or fund balances**	15,394,406.	19,811,704.	
	30 **Total liabilities and net assets/fund balances**	15,417,906.	19,822,704.	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	15,394,406.
2	Enter amount from Part I, line 27a	2	4,017,611.
3	Other increases not included in line 2 (itemize) ▶ BOOK-TAX DIFF	3	399,687.
4	Add lines 1, 2, and 3	4	19,811,704.
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 29	6	19,811,704.

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	CAPITAL GAINS FROM K-1'S	P		
b	UBS #Y3 03041 - CG DISTRIBUTION	P		
c	UBS #Y3 03041	P		
d	UBS #Y3 16484	P		
e	DISPOSITION OF ENERGY TRANSFER LP K-1	P		

	(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	219,366.			219,366.
b	125.			125.
c	3,253,910.		993,015.	2,260,895.
d	2,250,587.		248,641.	2,001,946.
e	312,052.			312,052.

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				219,366.
b				125.
c				2,260,895.
d				2,001,946.
e				312,052.

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 4,794,384.

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))
2018	612,925.	14,348,375.	.042717
2017	447,735.	10,956,530.	.040865
2016	442,192.	9,181,854.	.048159
2015	315,656.	9,000,944.	.035069
2014	245,153.	6,688,713.	.036652

2	**Total** of line 1, column (d)	2	.203462
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	.040692
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	22,664,359.
5	Multiply line 4 by line 3	5	922,258.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	50,118.
7	Add lines 5 and 6	7	972,376.
8	Enter qualifying distributions from Part XII, line 4	8	991,610.

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 ▶ [X] and enter 1% of Part I, line 27b	1	50,118.
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	50,118.
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	50,118.
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019 — 6a: 26,889.		
b	Exempt foreign organizations - tax withheld at source — 6b: 0.		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 70,000.		
d	Backup withholding erroneously withheld — 6d: 0.		
7	Total credits and payments. Add lines 6a through 6d	7	96,889.
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	46,771.
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 46,771. **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?	2		X
	If "Yes," attach a detailed description of the activities			
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?	5		X
	If "Yes," attach the statement required by *General Instruction T*			
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 2019 or the tax year beginning in 2019? 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 ▶ N/A

14 The books are in care of ▶ REALIZE CPA Telephone no. ▶415-362-5990

Located at ▶ 50 CALIFORNIA STREET # 3550, SAN FRANCISCO, CA ZIP+4 ▶94111

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 2019, 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

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

			Yes	No
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 N/A	1b		
	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 2019?	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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? ☐ 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 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) 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 2019?	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
JULIA LOEWY DAVIDSON 2494 SAND HILL ROAD MENLO PARK, CA 94025	PRESIDENT 1.00	0.	0.	0.
JAMES A. DAVIDSON 2494 SAND HILL ROAD MENLO PARK, CA 94025	CFO/SECRETARY 1.00	0.	0.	0.

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
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. 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 THE FOUNDATION PLANS TO MAKE DONATIONS AND GRANTS TO OTHER CHARITABLE ORGANIZATIONS, INCLUDING SCIENTIFIC, EDUCATIONAL AND LITERARY ORGANZATIONS.	0.
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.

Form **990-PF** (2019)

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	12,830,851.
b	Average of monthly cash balances	1b	4,156,413.
c	Fair market value of all other assets	1c	6,022,238.
d	**Total** (add lines 1a, b, and c)	1d	23,009,502.
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	23,009,502.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	345,143.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	22,664,359.
6	**Minimum investment return.** Enter 5% of line 5	6	1,133,218.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	1,133,218.
2a	Tax on investment income for 2019 from Part VI, line 5 2a 50,118.		
b	Income tax for 2019. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	50,118.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	1,083,100.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,083,100.
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	1,083,100.

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	991,610.
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	991,610.
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	50,118.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	941,492.

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				1,083,100.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			567,680.	
b Total for prior years: ______ , ______ , ______		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ 991,610.				
a Applied to 2018, but not more than line 2a			567,680.	
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 2019 distributable amount				423,930.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				659,170.
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 2014 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				

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 2019, 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) 2019	(b) 2018	(c) 2017	(d) 2016	(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).)

SEE STATEMENT 10

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.

SEE STATEMENT 11

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				
AMERICAN CANCER SOCIETY 250 WILLIAMS ST NW ATLANTA, GA 30303	NONE	NON PROFIT 501 (C)(3)	HEALTH AND RESEARCH	500.
AMERICAN CONSERVATORY THEATER 415 GEARY STREET SAN FRANCISCO, CA 94102	NONE	NON PROFIT 501 (C)(3)	ARTS	10,000.
BAY AREA OUTREACH AND RECREATION 3075 ADELINE ST STE 200 BERKELEY, CA 94703-2578	NONE	NON PROFIT 501 (C)(3)	COMMUNITY SUPPORT: DISABILITY	500.
BIG SKY SCHOOL DISTRICT 45465 GALLATIN RD GALLATIN GATEWAY, MT 59730	NONE	NON PROFIT 501 (C)(3)	EDUCATION	48,252.
BISHOP'S RANCH 5927 WESTSIDE RD HEALDSBURG, CA 95448	NONE	NON PROFIT 501 (C)(3)	COMMUNITY SUPPORT	2,500.
Total SEE CONTINUATION SHEET(S)			▶ 3a	991,610.
b Approved for future payment NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) 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			14	8,743.	
4 Dividends and interest from securities			14	219,786.	
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			01	<3.>	
8 Gain or (loss) from sales of assets other than inventory			18	658,977.	
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.		887,503.	0.
13 **Total.** Add line 12, columns (b), (d), and (e)				13	887,503.

(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 — Date: 11/12/2020 — Title: PRESIDENT

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
KYLE M. VINEYARD	Kyle M Vineyard	11/12/20		P00653810

Firm's name ▶ REALIZE CPA, LLP — Firm's EIN ▶ 94-3145806

Firm's address ▶ 50 CALIFORNIA STREET, SUITE 3550 SAN FRANCISCO, CA 94111 — Phone no. (415) 362-5990

Form 990-PF (2019)

923622 12-17-19

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
BOTHIN BURN CENTER 900 HYDE STREET SAN FRANCISCO, CA 94109	NONE	NON PROFIT 501 (C)(3)	MEDICAL TREATMENT FACILITY	2,500.
BOWDOIN COLLEGE 4100 COLLEGE STATION BRUNSWICK, ME 04011	NONE	NON PROFIT 501 (C)(3)	EDUCATION	50,223.
CA ACADEMY OF SCIENCES 55 MUSIC CONCOURSE DR., GOLDEN GATE PARK SAN FRANCISCO, CA 94118	NONE	NON PROFIT 501 (C)(3)	EDUCATION	2,500.
CRYSTAL SPRINGS UPLANDS SCHOOL 400 UPLANDS DRIVE HILLSBOROUGH, CA 94010	NONE	NON PROFIT 501 (C)(3)	EDUCATION	65,000.
DANA-FARBER CANCER INSTITUTE 450 BROOKLINE AVENUE BOSTON, MA 02215	NONE	NON PROFIT 501 (C)(3)	MEDICAL RESEARCH: CANCER	500.
DARTMOUTH COLLEGE 600 WEST KAGY BLVD HANOVER, NH 03755	NONE	NON PROFIT 501 (C)(3)	EDUCATION	59,969.
DUKE UNIVERSITY BOX 90581 DURHAM, NC 27708	NONE	NON PROFIT 501 (C)(3)	EDUCATION	123,134.
EAGLE MOUNT BOZEMAN 6901 GOLDENSTEIN BOZEMAN, MT 59715	NONE	NON PROFIT 501 (C)(3)	RESEARCH	5,000.
FINE ARTS MUSEUM OF SAN FRANCISCO 50 HAGIWARA TEA GARDEN DRIVE SAN FRANCISCO, CA 94118	NONE	NON PROFIT 501 (C)(3)	MEDICAL RESEARCH	10,516.
FOUNDATION FOR COLLEGE EDUCATION 2160 EUCLID AVE. EAST PALO ALTO, CA 94303	NONE	NON PROFIT 501 (C)(3)	EDUCATION	5,000.
Total from continuation sheets				929,858.

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
FOUNDATION FOR INDIVIDUAL RIGHTS (FIRE) 510 WALNUT ST. SUITE 1250 PHILADELPHIA, PA 19106	NONE	NON PROFIT 501 (C)(3)	COMMUNITY SUPPORT	1,000.
FRIENDS OF YEMIN 4340 EAST-WEST HIGHWAY SUITE 202 BETHESDA, MD 20814	NONE	NON PROFIT 501 (C)(3)	EDUCATION	10,000.
GREATER BAY AREA AMERICAN 1333 BROADWAY #200 OAKLAND, CA 94612	NONE	NON PROFIT 501 (C)(3)	EDUCATION	2,500.
HABITAT FOR HUMANITY 645 HARRISON STREET SAN FRANCISCO, CA 94107	NONE	NON PROFIT 501 (C)(3)	LOW INCOME SUPPORT	10,000.
HARVARD LAW SCHOOL 1563 MASSACHUSETTS AVENUE CAMBRIDGE, MA 02138	NONE	NON PROFIT 501 (C)(3)	EDUCATION	25,493.
HILLSBOROUGH BEAUTIFICATION 1600 FLORIBUNDA AVENUE HILLSBOROUGH, CA 94010	NONE	NON PROFIT 501 (C)(3)	VONG - 11/06/19 09:28AM WORKSHEET PRIVATE FOUNDATION	1,000.
HILLSBOROUGH SCHOOLS FOUNDATION 300 EL CERRITO AVENUE HILLSBOROUGH, CA 94010	NONE	NON PROFIT 501 (C)(3)	EDUCATION	10,000.
INTERNATIONAL RESCUE 122 EAST 42ND STREET NEW YORK, NY 10168	NONE	NON PROFIT 501 (C)(3)	COMMUNITY SUPPORT	10,000.
JUMPSTART 308 CONGRESS STREET, 6TH FLOOR BOSTON, MA 02210	NONE	NON PROFIT 501 (C)(3)	EARLY EDUCATION	5,000.
LIFE MOVES 181 CONSTITUTION DRIVE MENLO PARK, CA 95025	NONE	NON PROFIT 501 (C)(3)	COMMUNITY SUPPORT	10,000.
Total from continuation sheets				

923631
04-01-19

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
MONTEREY BAY AQUARIUM 886 CANNERY ROW MONTEREY, CA 93940	NONE	NON PROFIT 501 (C)(3)	EDUCATION	5,000.
MUSEUM OF THE ROCKIES 600 WEST KAGY BLVD BOZEMAN, MT 59717	NONE	NON PROFIT 501 (C)(3)	ARTS	2,500.
NAISMITH MEMORIAL BASKETBALL HALL OF FAME 1000 HALL OF FAME AVE SPRINGFIELD, MA 01105	NONE	NON PROFIT 501 (C)(3)	EDUCATION	2,500.
NATIONAL MS SOCIETY 1700 OWENS STREET, STE 190 SAN FRANCISCO, CA 94158	NONE	NON PROFIT 501 (C)(3)	MEDICAL RESEARCH	1,500.
PEBBLE BEACH CO. FOUNDATION PO BOX 1767 PEBBLE BEACH, CA 93953	NONE	NON PROFIT 501 (C)(3)	EDUCATIONAL OPPORTUNITIES FOR MONTEREY COUNTY YOUTH	1,200.
PENINSULA BRIDGE 457 KINGSLEY AVE PALO ALTO, CA 94301	NONE	NON PROFIT 501 (C)(3)	LOW INCOME EDUCATION ASSISTANCE	35,000.
PENINSULA YOUTH ORCHESTRA 1091 INDUSTRIAL ROAD #208 SAN CARLOS, CA 94070	NONE	NON PROFIT 501 (C)(3)	EDUCATION: MUSIC	1,000.
QUESTBRIDGE 445 SHERMAN AVE, SUITE 100 PALO ALTO, CA 94306	NONE	NON PROFIT 501 (C)(3)	EDUCATION	10,000.
SAN FRANCISCO BALLET 301 VAN NESS AVENUE SAN FRANCISCO, CA 94102	NONE	NON PROFIT 501 (C)(3)	ARTS	10,000.
SAN FRANCISCO MUSEUM OF MODERN ART 151 3RD STREET SAN FRANCISCO, CA 94103	NONE	NON PROFIT 501 (C)(3)	ARTS	10,000.
Total from continuation sheets				

923631
04-01-19

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
SAN FRANCISCO SYMPHONY 201 VAN NESS AVENUE SAN FRANCISCO, CA 94102	NONE	NON PROFIT 501 (C)(3)	ARTS AND MUSIC	10,000.
SAVE THE BAY 1330 BROADWAY, SUITE 1800 OAKLAND, CA 94612	NONE	NON PROFIT 501 (C)(3)	ENVIRONMENTAL	5,000.
SECOND HARVEST FOOD BANK 750 CURTNER AVENUE SAN JOSE, CA 95125	NONE	NON PROFIT 501 (C)(3)	COMMUNITY SUPPORT	10,000.
SMITHSONIAN INSTITUTION 3150 PARADISE DRIVE BELVEDERE TIBURON, CA 94920	NONE	NON PROFIT 501 (C)(3)	ARTS, CULTURE AND HUMANITIES	10,000.
ST. BALDRICKS FOUNDATION 1333 SOUTH MAYFLOWER AVENUE, STE 400 MONROVIA, CA 91016	NONE	NON PROFIT 501 (C)(3)	MEDICAL RESEARCH: CHILDHOOD CANCER	5,000.
ST.PAULS EPISCOPAL CHURCH 114 MONTECITO AVE OAKLAND, CA 94610	NONE	NON PROFIT 501 (C)(3)	RELIGIOUS	36,647.
STANFORD UNIVERSITY 450 SERRA MALL STANFORD, CA 94305	NONE	NON PROFIT 501 (C)(3)	EDUCATION	10,000.
TEACH FOR AMERICA 315 WEST 36TH STREET, 7TH FLOOR NEW YORK, NY 10018	NONE	NON PROFIT 501 (C)(3)	EDUCATION	10,000.
TEAM GO SAIL 217 MONSELL PL GREENPORT, NY 11944	NONE	NON PROFIT 501 (C)(3)	EDUCATION	10,000.
UC DAVIS ONE SHIELDS AVENUE DAVIS, CA 95616	NONE	NON PROFIT 501 (C)(3)	EDUCATION	5,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
UNITED RELIGIOUS INITIATIVE 1009 GENERAL KENNEDY AVE. SAN FRANCISCO, CA 94129	NONE	NON PROFIT 501 (C)(3)	RELIGIOUS	110,000.
UNIVERSITY OF MICHIGAN 500 S STATE STREET ANN ARBOR, MI 48109	NONE	NON PROFIT 501 (C)(3)	EDUCATION	35,372.
US OLYMPIC COMMITTEE 1 OLYMPIC PLAZA COLORADO SPRINGS, CO 80909	NONE	NON PROFIT 501 (C)(3)	SUPPORT FOR TEAM USA	148,971.
YALE UNIVERSITY 157 CHURCH STREET NEW HAVEN, CT 06510	NONE	NON PROFIT 501 (C)(3)	EDUCATION	2,500.
YELLOWSTONE CLUB COMMUNITY FOUNDATION 111 RESEARCH DR STE B BOZEMAN, MT 59718	NONE	NON PROFIT 501 (C)(3)	PHILANTHROPY, VOLUNTARISM AND GRANTMAKING	33,333.
Total from continuation sheets				

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2019

Name of the organization: STORM CASTLE FOUNDATION

Employer identification number: 20-8681172

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 property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3%-support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000, or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

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

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

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

Name of organization: STORM CASTLE FOUNDATION

Employer identification number: 20-8681172

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	JIM & JULIA DAVIDSON 2494 SAND HILL ROAD MENLO PARK, CA 94025	$ 2,171,587.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
2	JIM & JULIA DAVIDSON 2494 SAND HILL ROAD MENLO PARK, CA 94025	$ 1,987,253.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization: STORM CASTLE FOUNDATION

Employer identification number: 20-8681172

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	8,326 SHARES OF BROADCOM: $2,171,587	$ 2,171,587.	
2	26,525 SHARES OF GODADDY: $1,987,253	$ 1,987,253.	
		$	
		$	
		$	
		$	

Name of organization	Employer identification number
STORM CASTLE FOUNDATION	20-8681172

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 info once) ▶ $

Use duplicate copies of Part III if additional space is needed

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

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

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

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

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

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

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

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

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

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
CAPITAL GAINS FROM K-1'S	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
219,366.	0.	0.	0.	219,366.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
UBS #Y3 03041 - CG DISTRIBUTION	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
125.	0.	0.	0.	125.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
UBS #Y3 03041	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
3,253,910.	2,780,262.	0.	0.	473,648.

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
UBS #Y3 16484			PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
2,250,587.	2,284,749.	0.	0.	<34,162.>

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
DISPOSITION OF ENERGY TRANSFER LP K-1			PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
312,052.	312,052.	0.	0.	0.

CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	658,977.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
UBS #Y3 03041	7,382.	7,382.	
UBS #Y3 16484	1,361.	1,361.	
TOTAL TO PART I, LINE 3	8,743.	8,743.	

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
UBS #Y3 03041	187,898.	0.	187,898.	187,898.	
UBS #Y3 16484	31,888.	0.	31,888.	31,888.	
TO PART I, LINE 4	219,786.	0.	219,786.	219,786.	

FORM 990-PF	OTHER INCOME	STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
AG INVESTORS, LLC	<8,789.>	<8,789.>	
ENERGY TRANSFER, LP	<24,025.>	<24,025.>	
GOVT REFUND	10,645.	10,645.	
H.BARTON VENTURE SELECT II, LLC	<40,883.>	<40,883.>	
LIGHT STREET BEACON I, LP	<23,140.>	<23,140.>	
LIGHT STREET HALOGEN, LP	<102,046.>	<102,046.>	
MAKENA CAP SPLITTER X, LP	<7,506.>	<7,506.>	
SL WATERMAN FUND I, LP	59,626.	59,626.	
SL WATERMAN FUND II, LP	136,122.	136,122.	
SL WATERMAN FUND III, LP	<7.>	<7.>	
TOTAL TO FORM 990-PF, PART I, LINE 11	<3.>	<3.>	

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MANAGEMENT FEES	11,122.	11,122.		0.
TO FORM 990-PF, PG 1, LN 16C	11,122.	11,122.		0.

FORM 990-PF	TAXES	STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAXES - IRS	26,000.	0.		0.
TO FORM 990-PF, PG 1, LN 18	26,000.	0.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ALIBABA	912,218.	1,920,566.
ALPHABET	126,341.	133,319.
AMAZON	64,350.	306,741.
ARISTA NETWORKS	394,812.	407,003.
BROADCOM	1,864,341.	2,258,911.
EQINIX	113,114.	116,530.
GLOBANT	875,422.	1,664,667.
GODADDY	842,709.	759,210.
INVESCO	4,246.	4,940.
JP MORGAN	1,054,543.	1,692,874.
MICROSOFT	250,858.	283,860.
PALO ALTO NETWORKS	252,432.	254,221.
PAYPAL HOLDINGS	123,572.	129,732.
SABRE	1,096,144.	992,633.
VANGUARD DIV APP	65,018.	102,097.
XILINX INC	125,320.	125,164.
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,165,440.	11,152,468.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 8

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
AG INVESTORS	COST	227,637.	272,844.
H BARTON	COST	1,079,639.	1,694,388.
LIGHT STREET HALOGEN LP	COST	1,035,078.	1,189,939.
MAKENA CAPITAL SPLITTER X, LP	COST	1,424,933.	1,189,384.
SILVER LAKE WATERMAN FUND	COST	368,753.	351,849.
SILVER LAKE WATERMAN FUND II	COST	598,564.	568,980.
LIGHT STREET BEACON I LP	COST	673,604.	679,438.

SILVER LAKE WATERMAN FUND III	COST	70,119.	68,769.
TOTAL TO FORM 990-PF, PART II, LINE 13		5,478,327.	6,015,591.

FORM 990-PF OTHER ASSETS STATEMENT 9

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DIVIDEND RECEIVABLE	4,292.	0.	0.
INTEREST RECEIVABLE	172.	966.	966.
DISTRIBUTION RECEIVABLE	43.	43.	43.
TO FORM 990-PF, PART II, LINE 15	4,507.	1,009.	1,009.

FORM 990-PF PART XV - LINE 1A STATEMENT 10
LIST OF FOUNDATION MANAGERS

NAME OF MANAGER

JULIA LOEWY DAVIDSON
JAMES A. DAVIDSON

FORM 990-PF PART XV - LINE 1B STATEMENT 11
LIST OF FOUNDATION MANAGERS

NAME OF MANAGER

JULIA LOEWY DAVIDSON
JAMES A. DAVIDSON

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

JULIA LOEWY DAVIDSON
2494 SAND HILL ROAD
MENLO PARK, CA 94025

TELEPHONE NUMBER

650-233-8120

FORM AND CONTENT OF APPLICATIONS

THE APPLICATION SHOULD BE IN WRITTEN FORM AND SENT TO THE FOUNDATION. THE MATERIALS SHOULD STATE THE OBJECTIVE OF THE ORGANIZATION, AMOUNT REQUESTED, AND THE PRINCIPAL MANAGERS OF THE ORGANIZATION.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE