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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

2019

Open to Public Inspection

For calendar year 2019, or tax year beginning 01-01-2019, and ending 12-31-2019

Name of foundation
RUDI SCHULTE FAMILY FOUNDATION

A Employer identification number
77-0452600

Number and street (or P O box number if mail is not delivered to street address)
PO BOX 60921

Room/suite

B Telephone number (see instructions)
(805) 452-8114

City or town, state or province, country, and ZIP or foreign postal code
SANTA BARBARA, CA 93160

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)

J Accounting method

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

(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)

2 Check If the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a

7 Capital gain net income (from Part IV, line 2)

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

Operating and Administrative Expenses

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach schedule)

c Other professional fees (attach schedule)

17 Interest

18 Taxes (attach schedule) (see instructions)

19 Depreciation (attach schedule) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

24 Total operating and administrative expenses. Add lines 13 through 23

25 Contributions, gifts, grants paid

26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-)

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2019)

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				
	2	Savings and temporary cash investments	341,240	209,962	209,962	
	3	Accounts receivable ▶ <u>3,000</u>				
		Less allowance for doubtful accounts ▶ _____		3,000	3,000	
	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)	730	9,230	9,230	
	7	Other notes and loans receivable (attach schedule) ▶ <u>437,548</u>				
		Less allowance for doubtful accounts ▶ <u>0</u>	476,340	437,548	437,548	
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		9,576	9,576	
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)				
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis ▶ _____				
	Less accumulated depreciation (attach schedule) ▶ _____					
12	Investments—mortgage loans					
13	Investments—other (attach schedule)	9,606,192	9,492,990	10,101,345		
14	Land, buildings, and equipment basis ▶ _____					
	Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)					
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	10,424,502	10,162,306	10,770,661		
Liabilities	17	Accounts payable and accrued expenses				
	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 ▶ _____)				
	23	Total liabilities (add lines 17 through 22)	0	0		
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	10,424,502	10,162,306		
	27	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0		
	28	Retained earnings, accumulated income, endowment, or other funds	0	0		
	29	Total net assets or fund balances (see instructions)	10,424,502	10,162,306		
30	Total liabilities and net assets/fund balances (see instructions) .	10,424,502	10,162,306			

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 10,424,502
2	Enter amount from Part I, line 27a	2 -274,099
3	Other increases not included in line 2 (itemize) ▶ _____	3 11,903
4	Add lines 1, 2, and 3	4 10,162,306
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 10,162,306

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 FIDELITY #119		2019-01-01	2019-12-31
b CAPITAL GAINS DIVIDENDS	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 29,989			29,989
b 39,714			39,714
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			29,989
b			39,714
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	69,703
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))
2018	498,399	10,656,891	0 046768
2017	556,101	10,698,323	0 051980
2016	411,803	10,133,390	0 040638
2015	413,445	10,738,662	0 038501
2014	467,629	11,092,885	0 042156

2 Total of line 1, column (d)	2	0 220043
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 044009
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	10,303,394
5 Multiply line 4 by line 3	5	453,442
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,327
7 Add lines 5 and 6	7	455,769
8 Enter qualifying distributions from Part XII, line 4	8	504,446

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	2,327
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	2,327
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	2,327
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	11,903
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	11,903
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	9,576
11	Enter the amount of line 10 to be Credited to 2020 estimated tax ▶ 9,576 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	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	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 ▶ \$ 0 (2) On foundation managers ▶ \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2	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? If "Yes," attach a conformed copy of the changes	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? If "Yes," attach the statement required by General Instruction T	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? If "Yes," complete Part II, col (c), and Part XV	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? If "No," attach explanation .	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 2019 or the taxable year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	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>N/A</u>	13	Yes	
14	The books are in care of ► <u>DAMITZ BROOKS NIGHTINGALE ET AL</u> Telephone no ► <u>(805) 963-1837</u>			

Located at ► 200 E CARRILLO ST STE 303 SANTA BARBARA CA ZIP+4 ► 93101

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 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	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		No
	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		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 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019?		☐ 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 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019).	3b		No
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 2019?	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	
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.

1	Expenses

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	8,734,241
b	Average of monthly cash balances.	1b	291,538
c	Fair market value of all other assets (see instructions).	1c	1,434,519
d	Total (add lines 1a, b, and c).	1d	10,460,298
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	10,460,298
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	156,904
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,303,394
6	Minimum investment return. Enter 5% of line 5.	6	515,170

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	515,170
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	2,327
b	Income tax for 2019 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,327
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	512,843
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	512,843
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	512,843

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	504,446
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	504,446
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	2,327
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	502,119

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				512,843
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only.			487,083	
b Total for prior years 20____, 20____, 20____		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 ▶ \$ 504,446				
a Applied to 2018, but not more than line 2a			487,083	
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.				17,363
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 instructions			0	
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				495,480
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 (see instructions).	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)

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

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
2a 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))

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 email address of the person to whom applications should be addressed

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 <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	494,400
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

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) (See instructions)
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Form **990-PF** (2019)

Part XVII

	Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)	No
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1b(3)		No
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1b(4)		No
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1b(5)		No
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1b(6)		No
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1c		No
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value
ue

[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

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.

Sign Here ***** _____ Signature of officer or trustee	2020-08-17 _____ Date	***** _____ Title
--	--	--

May the IRS discuss this return with the preparer shown below

(see instr) ☒ **Yes** ☐ **No**

May the IRS discuss this return with the preparer shown below

(see instr) ☒ Yes ☐ No

Paid Preparer Use Only	CATHERINE MACAULAY			
	Firm's name ▶ DAMITZ BROOKS NIGHTINGALE Firm's EIN ▶ 77-0076647			

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00178796
	CATHERINE MACAULAY				
	Firm's name ▶ DAMITZ BROOKS NIGHTINGALE				Firm's EIN ▶ 77-0076647
	Firm's address ▶ 200 EAST CARRILLO STREET SUITE 303 SANTA BARBARA, CA 93101				Phone no (805) 963-1837

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
PAUL S SCHULTE	PRESIDENT 1 00	0	0	0
PO BOX 60921 SANTA BARBARA, CA 93160				
PETER R SCHULTE	VICE PRESIDENT 1 00	0	0	0
PO BOX 60921 SANTA BARBARA, CA 93160				
SYLVIA M MOLONY	ASSISTANT VP 1 00	0	0	0
PO BOX 60921 SANTA BARBARA, CA 93160				
HENRY G SCHULTE	SECTRY / TRSR 1 00	0	0	0
PO BOX 60921 SANTA BARBARA, CA 93160				
MARK M AIJIAN	DIRECTOR 1 00	0	0	0
PO BOX 60921 SANTA BARBARA, CA 93160				

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>				
A COMPASPO BOX 30594 SANTA BARBARA, CA 93130	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
ANGELS FOSTER FAMILY NETWORK 9295 FARNHAM STREET SUITE 200 SAN DIEGO, CA 92123	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,800
ARIEL THEATRICAL INC 320 MAIN STREET SALINAS, CA 93901	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	15,000
Total ▶ 3a				494,400

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				
ARMENIAN RELIEF AND DEVELOPMENT ASSOCIATION 1546 E WASHINGTON BOULEVARD PASADENA, CA 91104	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
ARTS MENTORSHIP PROGRAM 531 E COTA STREET SANTA BARBARA, CA 93103	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
BISHOP GARCIA DIEGO HIGH SCHOOL 4000 LA COLINA ROAD SANTA BARBARA, CA 93110	NONE	PC	ADOPT-A-STUDENT PROGRAM	14,500
Total ► 3a				494,400

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				
BOSTON CHILDREN'S HOSPITAL TRUST 401 PARK DRIVE SUITE 602 BOSTON, MA 02215	NONE	PC	MILES FOR MIRACLES PROGRAM	3,000
BOYS AND GIRLS CLUB 602 W ANAPAMU STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
BREAST CANCER RESOURCE CENTER 525 W JUNIPERO STREET SANTA BARBARA, CA 93105	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
Total ▶ 3a				494,400

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>				
CAMP KESEM 10586 W PICO BOULEVARD 196 LOS ANGELES, CA 90064	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
CARRIAGE AND WESTERN ART MUSEUM OF SANTA BARBARA PO BOX 1587 SANTA BARBARA, CA 93102	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	8,500
CHALLENGED ATHLETES INC 9591 WAPLES STREET SAN DIEGO, CA 92121	NONE	PC	SAN DIEGO TRIATHLON CHALLENGE	41,000
Total ▶ 3a				494,400

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>				
CHELSEA'S LIGHT FOUNDATION 12463 RANCHO BERNARDO ROAD 519 SAN DIEGO, CA 92128	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	20,000
COUNCIL ON ALCOHOLISM & DRUG ABUSE 232 E CANON PERDIDO STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
CROSS CATHOLIC OUTREACH 2700 N MILITARY TRAIL SUITE 240 BOCA RATON, FL 33427	NONE	PC	HURRICANE DORIAN RELIEF FOR BAHAMAS RESIDENTS	1,000
Total ▶ 3a				494,400

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 333 7TH AVENUE 2ND FLOOR NEW YORK, NY 10001	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	590
DOMESTIC VIOLENCE SOLUTIONS FOR SANTA BARBARA COUNTY PO BOX 1536 SANTA BARBARA, CA 93102	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
DOS PUEBLOS HIGH SCHOOL 7266 ALAMEDA AVENUE GOLETA, CA 93117	NONE	PC	BOYS BASKETBALL	1,000
Total ▶ 3a				494,400

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>				
DREAM FOUNDATION 1528 CHAPALA STREET SUITE 304 SANTA BARBARA, CA 93101	NONE	PC	9TH ANNUAL FLOWER EMPOWER LUNCHEON	5,000
ENCHANTED FARM SANCTUARY INC 21830 NE HIGHWAY 240 NEWBERG, OR 97132	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	18,000
ENDOWMENT FOR YOUTH COMMITTEE 606 ALAMO PINTADO ROAD SUITE 3274 SOLVANG, CA 93427	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
Total ► 3a				494,400

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>				
FAMILY SERVICE AGENCY 123 WEST GUTIERREZ STREET SANTA BARBARA, CA 93101	NONE	PC	COOKING UP DREAMS	2,500
FRIENDS OF VADAPO BOX 4426 SANTA BARBARA, CA 93140	NONE	PC	ART OF THE DRAW	1,000
FUTURE TRADITIONS FOUNDATION 2911 LA COMBADURA ROAD SANTA BARBARA, CA 93105	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
Total ▶ 3a				494,400

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>				
GIRLS ROCK SB 1552B EUCALYPTUS HILL ROAD SANTA BARBARA, CA 93103	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
GRASSROOTS SOCCER 15 LEBANON STREET HANOVER, NH 03755	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	10,000
HEARTS THERAPEUTICPO BOX 30662 SANTA BARBARA, CA 93130	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
Total ▶ 3a				494,400

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				
JUDICIAL WATCH 425 THIRD STREET SUITE 800 WASHINGTON, DC 20024	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
KIDS HELPING KIDS 347 STILLWATER AVENUE STAMFORD, CT 06902	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
KIWANIS FOUNDATION OF SANTA BARBARA PO BOX 773 SANTA BARBARA, CA 93102	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
Total ▶ 3a				494,400

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 CHURCH OF CHRIST 2310 CHAPALA STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
LINCOLN CITY WARMING SHELTER PO BOX 198 LINCOLN CITY, OR 97367	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
LOBERO THEATER FOUNDATION 33 E CANON PERDIDO STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
Total ► 3a				494,400

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				
MARYMOUNT OF SANTA BARBARA 2130 MISSION RIDGE ROAD SANTA BARBARA, CA 93103	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
MOUNTAIN VIEW SCHOOL FOUNDATION 311 E CARRILLO STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
NATIONAL BOY SCOUTS OF AMERICA COUNCIL 1325 W WALNUT HILL IRVING, TX 75038	NONE	PC	TROOP #26	2,000
Total ▶ 3a				494,400

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>				
NOTES FOR NOTES INCORPORATED PO BOX 90632 SANTA BARBARA, CA 93190	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
OLAS FOUNDATION509 N 10TH ST SANTA PAULA, CA 93060	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
PACIFIC LEGAL FOUNDATION 930 G STREET SACRAMENTO, CA 95814	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
Total ▶ 3a				494,400

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>				
PACIFIC PRIDE FOUNDATION 126 E HALEY STREET A-11 SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	8,500
PALOMAR HEALTH FOUNDATION 960 CANTERBURY PLACE SUITE 200 ESCONDIDO, CA 92025	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	40,000
PANCREATIC CANCER ACTION NETWORK INC 1500 ROSECRANS AVENUE SUITE 200 MANHATTAN BEACH, CA 90266	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	20,000
Total ▶ 3a				494,400

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>				
PIERRE CLAEYSSSENS VETERANS MUSEUM AND LIBRARY FOUNDATION 1187 COAST VILLAGE ROAD SUITE 1 334 SANTA BARBARA, CA 93108	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	4,500
RESCUE WATERCRAFT ASSOCIATION 13681 NEWPORT AVENUE SUITE 8-417 TUSTIN, CA 92780	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
RETURN TO FREEDOMPO BOX 926 LOMPOC, CA 93438	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,500
Total ► 3a				494,400

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>				
ROOSEVELT ELEMENTARY EDUCATIONAL FOUNDATION 1990 LAGUNA STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
SAFE FAMILIES FOR CHILDREN ALLIANCE PO BOX 60921 SANTA BARBARA, CA 93160	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
SAN PEDRO ELITE 7290 EDINGER AVE UNIT 3151 HUNTINGTON BEACH, CA 92647	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	6,000
Total ▶ 3a				494,400

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 AUDUBON SOCIETY PO BOX 5508 SANTA BARBARA, CA 93150	NONE	PC	EYE'S IN THE SKY PROGRAM	1,000
SANTA BARBARA BLUES SOCIETY PO BOX 30853 SANTA BARBARA, CA 93130	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
SANTA BARBARA CITY COLLEGE 721 CLIFF DRIVE SANTA BARBARA, CA 93109	NONE		MEN'S AND WOMEN'S TRACK AND FIELD TEAM	7,000
Total ▶ 3a				494,400

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 CITY FIREFIGHTER ASSOCIATION 121 W CARRILLO STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
SANTA BARBARA COUNTY SHERIFFS BENEVOLENT POSSE 4434 CALLE REAL SANTA BARBARA, CA 93110	NONE	PC	D A R E	2,000
SANTA BARBARA HUMANE SOCIETY FOR THE PREVENTION OF CRUELTY TO ANIMALS 5399 OVERPASS ROAD SANTA BARBARA, CA 93111	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
Total ► 3a				494,400

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 INTERNATIONAL FILM FESTIVAL 1528 CHAPALA STREET SUITE 203 SANTA BARBARA, CA 93101	NONE	PC	RIVERIA THEATER MEMBERSHIP	1,800
SANTA BARBARA PRO SKILLS ACADEMY 309 MOHAWK ROAD SANTA BARBARA, CA 93109	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	6,000
SANTA BARBARA RESCUE MISSION 535 E YANONALI STREET SANTA BARBARA, CA 93103	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	10,000
Total ▶ 3a				494,400

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 VETERANS ASSOCIATION 129 CASTILLO STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
SANTA BARBARA VOLLEYBALL CLUB PO BOX 30772 SANTA BARBARA, CA 93130	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
SANTA BARBARA ZOOLOGICAL FOUNDATION 500 NINOS DRIVE SANTA BARBARA, CA 93103	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
Total ▶ 3a				494,400

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				
SANTA YNEZ COTTAGE HOSPITAL PO BOX 689 SANTA BARBARA, CA 93102	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,750
SANTA YNEZ VALLEY ROTARY CLUB PO BOX 121 SOLVANG, CA 93464	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
SANTA YNEZ VALLEY SENIOR CITIZENS' FOUNDATION 164 WEST HIGHWAY 246 BUELLTON, CA 93427	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
Total ▶ 3a				494,400

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				
SANTA YNEZ VALLEY THERAPEUTIC RIDING PROGRAM PO BOX 256 SOLVANG, CA 93464	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
SAVE THE WAVES COALITION PO BOX 183 3500 HIGHWAY ONE DAVENPORT, CA 95017	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	20,000
SOLVANG FESTIVAL THEATER PO BOX 917 SOLVANG, CA 93464	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	9,500
Total ▶ 3a				494,400

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>				
SOLVANG FRIENDSHIP HOUSE 880 FRIENDSHIP LANE SOLVANG, CA 93463	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
ST RAPHAEL CATHOLIC CHURCH 5444 HOLLISTER AVENUE SANTA BARBARA, CA 93111	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	20,000
ST RAPHAEL SCHOOL 160 S JOSEPH STREET SANTA BARBARA, CA 93111	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	15,000
Total ▶ 3a				494,400

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>				
ST VINCENT'S SANTA BARBARA 4200 CALLE REAL SANTA BARBARA, CA 93110	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,960
STAR JASMINE MUSIC FOUNDATION 126 COOPER SANTA BARBARA, CA 93109	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,250
SUMMIT4CAD 130 S PATTERSON AVENUE 60401 SANTA BARBARA, CA 93160	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
Total ► 3a				494,400

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				
SURF HAPPENS 3825 SANTA CLAUS LANE CARPINTERIA, CA 93013	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
TEDDY BEAR CANCER FOUNDATION 3892 STATE STREET SUITE 220 SANTA BARBARA, CA 93105	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	10,250
THE ADDERLEY SCHOOL 601 W 5TH STREET AUSTIN, TX 78759	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
Total ► 3a				494,400

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 COLAB FOUNDATIONPO BOX 7523 SANTA MARIA, CA 93456	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	10,000
THE WILDLING MUSEUM OF ART & NATURE 1511-B MISSION DRIVE SOLVANG, CA 93463	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
TRUE VINE BIBLE FELLOWSHIP 533 AVALON STREET A LOMPOC, CA 93436	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	4,000
Total ▶ 3a				494,400

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>				
TUSTIN HIGH SCHOOL 1171 EL CAMINO REAL TUSTIN, CA 92780	NONE	PC	INSTRUMENTAL MUSIC PROGRAM	1,000
TV SANTA BARBARA 329 S SALINAS STREET SANTA BARBARA, CA 93103	NONE	PC	ANIMAL ZONE	5,000
UC REGENTS UNIVERSITY OF CALIFORNIA SANTA BARBARA SANTA BARBARA, CA 93106	NONE	PC	MEN'S WATER POLO & DOLAND BREN SCHOOL	10,000
Total ► 3a				494,400

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>				
UNITED WAY OF SANTA BARBARA COUNTY 320 E GUTIERREZ STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
VISITING NURSE AND HOSPICE CARE 509 E MONTECITO STREET SUITE 200 SANTA BARBARA, CA 93103	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,500
WE SUPPORT THE TROOPS INC PO BOX 915 SANTA YNEZ, CA 93460	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,500
Total ▶ 3a				494,400

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				
WHITE BUFFALO LAND TRUST PO BOX 226 SUMMERLAND, CA 93067	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	6,000
YOUNG AMERICA'S FOUNDATION 11480 COMMERCE PARK DRIVE SUITE 600 RESTON, VA 20191	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
Total ▶ 3a				494,400

TY 2019 Accounting Fees Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DAMITZ BROOKS NIGHTINGALE ET AL	13,209	4,359		8,850

TY 2019 Distribution from Corpus Election

Name: RUDI SCHULTE FAMILY FOUNDATION

EIN: 77-0452600

Election: PURSUANT TO IRC SECTION 4942(H)(2) AND REGULATION 53.4942(A)-3(D)(2), THE FOUNDATION HEREBY ELECTS TO TREAT CURRENT YEAR QUALIFYING DISTRIBUTIONS IN EXCESS OF THE IMMEDIATELY PRECEDING TAX YEAR'S UNDISTRIBUTED INCOME AS BEING MADE OUT OF
CORPUS.SIGNED:_____ PAUL S.
SCHULTE PRESIDENT

TY 2019 General Explanation Attachment**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600**General Explanation Attachment**

Identifier	Return Reference	Explanation	
1		FORM 990-PF, PART VII-B, LINE 1A(4)	THE FOUNDATION UTILIZES THE SERVICES OF DEFINE FINANCIAL OF WHICH MR. TAYLOR SCHULTE IS FOUNDER AND CHIEF EXECUTIVE OFFICER, MR. SCHULTE IS THE SON OF PETER R. SCHULTE, THE VICE PRESIDENT OF THE FOUNDATION FOR THESE SERVICES THE FOUNDATION PAYS THE USUAL AND CUSTOMARY FEES AS BILLED TO IT BY THIS ENTITY

TY 2019 Investments - Other Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS	AT COST	8,496,019	9,104,374
PARTNERSHIP INVESTMENT - THE PINES RESORT	FMV	996,971	996,971

TY 2019 Legal Fees Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SCHLEY LOOK & GUTHRIE	1,730	865		865

TY 2019 Other Expenses Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE-D&O	450	225		225
FILING FEES	85	0		85
OFFICE EXPENSE	12	6		6
BANK FEES	30	15		15

TY 2019 Other Increases Schedule

Name: RUDI SCHULTE FAMILY FOUNDATION
EIN: 77-0452600

Description	Amount
PRIOR PERIOD ADJUSTMENT	11,903

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

**TY 2019 Other
Notes/Loans Receivable
Long Schedule**

Name: RUDI SCHULTE FAMILY FOUNDATION
EIN: 77-0452600

Borrower's Name	Relationship to Insider	Original Amount of Loan	Balance Due	Date of Note	Maturity Date	Repayment Terms	Interest Rate	Security Provided by Borrower	Purpose of Loan	Description of Lender Consideration	Consideration FMV
VIP FUTURES LP - ORANGE GARDEN	NONE	2,037,000	284,939	1991-03	2029-03	PAYABLE MONTHLY	716 00000000000 %	NONE	GENERAL	BEQUEST	0
VIP FUTURES LP - WESTERN GRDN	NONE	1,091,000	152,609	1991-03	2029-03	PAYABLE MONTHLY	716 00000000000 %	NONE	GENERAL	BEQUEST	0
ORANGE GARDENSWESTERN GARDENS	NONE	735	0			IMMEDIATELY	0 %	NONE	GENERAL	CASH	0

TY 2019 Other Professional Fees Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	62,095	62,095		0

TY 2019 Taxes Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	2,327	0		0