

Form **990-PF****Return of Private Foundation**

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

Department of the Treasury
Internal Revenue Service

- 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 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation - RAVI AND NAINA PATEL FOUNDATION		A Employer identification number 77-0490360
Number and street (or P O box number if mail is not delivered to street address) 6501 TRUXTON AVENUE	Room/suite	B Telephone number 661-322-2206
City or town, state or province, country, and ZIP or foreign postal code BAKERSFIELD, CA 93309		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization. <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 24,592,324.	J Accounting method. <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	1,506,394.		N/A	
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	31,354.	31,329.		STATEMENT 1
	4 Dividends and interest from securities	143,154.	143,154.		STATEMENT 2
	5a Gross rents	<35,625.>	<14,539.>		STATEMENT 3
	b Net rental income or (loss)	<35,625.>			
	6a Net gain or (loss) from sale of assets not on line 10	2,630,757.			
	b Gross sales price for all assets on line 6a	18,720,682.			
	7 Capital gain net income (from Part IV, line 2)		2,630,757.		
	8 Net short-term capital gain				
	9 Income modifications				
10a Gross sales less returns and allowances	484,007.			STATEMENT 4	
b Less Cost of goods sold	204,248.			STATEMENT 5	
c Gross profit or (loss)	279,759.				
11 Other income	71,955.	73,961.		STATEMENT 6	
12 Total. Add lines 1 through 11	4,627,748.	2,864,662.			
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 7	2,000.	0.	0.
	17 Interest				
	18 Taxes	STMT 8	545.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses	STMT 9	403,440.	52,489.	55,668.
	24 Total operating and administrative expenses. Add lines 13 through 23		405,985.	52,489.	55,668.
	25 Contributions, gifts, grants paid		121,636.		116,636.
26 Total expenses and disbursements. Add lines 24 and 25		527,621.	52,489.	172,304.	
27 Subtract line 26 from line 12.					
a Excess of revenue over expenses and disbursements		4,100,127.			
b Net investment income (if negative, enter -0-)			2,812,173.		
c Adjusted net income (if negative, enter -0-)			N/A		

Part II - Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	474,571.	2,086,544.	2,086,544.	
	2 Savings and temporary cash investments	1,996,498.	1,882,582.	1,882,582.	
	3 Accounts receivable ▶ 14,745.				
	Less: allowance for doubtful accounts ▶	11,490.	14,745.	14,745.	
	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				
	c Investments - corporate bonds				
	Liabilities	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶					
12 Investments - mortgage loans					
13 Investments - other STMT 11		13,413,315.	15,593,810.	20,608,453.	
14 Land, buildings, and equipment basis ▶					
Less: accumulated depreciation ▶					
15 Other assets (describe ▶)					
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		15,895,874.	19,577,681.	24,592,324.	
17 Accounts payable and accrued expenses		22,373.	20,449.		
18 Grants payable					
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶)	416,396.	0.		
23 Total liabilities (add lines 17 through 22)	438,769.	20,449.			
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/>				
	24 Net assets without donor restrictions				
	25 Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/>				
	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	15,457,105.	19,557,232.		
	29 Total net assets or fund balances	15,457,105.	19,557,232.	STATEMENT 10	
30 Total liabilities and net assets/fund balances	15,895,874.	19,577,681.			

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	15,457,105.
2 Enter amount from Part I, line 27a	2	4,100,127.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	19,557,232.
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	19,557,232.

Form 990-PF (2019)

Part IV Capital Gains and Losses for Tax on Investment Income SEE ATTACHED STATEMENTS

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e	18,720,682.	16,089,925.	2,630,757.		
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.					
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
a					
b					
c					
d					
e			2,630,757.		
2 Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="margin-left: 10px;"> <div style="border: 1px solid black; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center;">2</div> </div> </div>		2,630,757.		
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	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 </div> <div style="margin-left: 10px;"> <div style="border: 1px solid black; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center;">3</div> </div> </div>		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	166,331.	20,532,877.	.008101
2017	132,122.	15,901,162.	.008309
2016	1,423,059.	14,276,205.	.099680
2015	1,592,896.	12,949,602.	.123007
2014	1,327,534.	11,846,823.	.112058
2 Total of line 1, column (d)			.351155
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			.070231
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			19,955,400.
5 Multiply line 4 by line 3			1,401,488.
6 Enter 1% of net investment income (1% of Part I, line 27b)			28,122.
7 Add lines 5 and 6			1,429,610.
8 Enter qualifying distributions from Part XII, line 4			172,304.

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 <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	56,243.
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	56,243.
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	56,243.
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	0.
b	Exempt foreign organizations - tax withheld at source	6b	0.
c	Tax paid with application for extension of time to file (Form 8868)	6c	0.
d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	0.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	110.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	56,353.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2020 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/> 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	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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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		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		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	X	
14 The books are in care of ► PRITESH PATEL Telephone no. ► 661-322-2206 Located at ► 6501 TRUXTON AVENUE, BAKERSFIELD, CA ZIP+4 ► 93309		
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		
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

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

	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here	N/A	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?		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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		X

Form 990-PF (2019)

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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	<input checked="" type="checkbox"/>	
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	
If "Yes," attach the statement required by Regulations section 53.4945-5(d)	<input type="checkbox"/> Yes <input type="checkbox"/> No	
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b
If "Yes" to 6b, file Form 8870.		X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
RAVI PATEL 6501 TRUXTUN AVENUE BAKERSFIELD, CA 93309	PRESIDENT 0.00	0.	0.	0.
NAINA PATEL 6501 TRUXTUN AVENUE BAKERSFIELD, CA 93309	VICE-PRESIDENT 0.00	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

Form 990-PF (2019)

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 N/A	
	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	
	0.
2	
All other program-related investments See instructions.	
3 NONE	
	0.
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	17,349,467.
b	Average of monthly cash balances	1b	2,909,822.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	20,259,289.
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	20,259,289.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	303,889.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	19,955,400.
6	Minimum investment return. Enter 5% of line 5	6	997,770.

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	997,770.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	56,243.
b	Income tax for 2019. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	56,243.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	941,527.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	941,527.
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	941,527.

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	172,304.
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	172,304.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	172,304.

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.

Form 990-PF (2019)

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				941,527.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014	450,036.			
b From 2015	964,422.			
c From 2016	713,160.			
d From 2017				
e From 2018				
f Total of lines 3a through e	2,127,618.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$	172,304.			
a Applied to 2018, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				172,304.
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))	769,223.			769,223.
6 Enter the net total of each column as indicated below	1,358,395.			
a Corpus: Add lines 3f, 4c, and 4e. Subtract line 5				
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				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	1,358,395.			
10 Analysis of line 9:				
a Excess from 2015	645,235.			
b Excess from 2016	713,160.			
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(1)(3) or ☐ 4942(1)(5)

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

b 85% of line 2a

c Qualifying distributions from Part XII,
line 4, for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly
for active conduct of exempt activities
Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test - enter.
(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed

c "Support" alternative test - enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

PRITESH PATEL, 661-322-2206
6501 TRUXTUN AVENUE, BAKERSFIELD, CA 93309

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

LETTER FORMAT

- c Any submission deadlines:**

N/A

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

N/A

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				
ALLIANCE AGAINST FAMILY VIOLENCE 1921 19TH STREET BAKERSFIELD, CA 93301		CHARITY	FOR ASSISTANCE IN FIGHTING DOMESTIC VIOLENCE AND SEXUAL ASSAULT	30,000.
AMERICAN PROGRAM BUREAU ONE GATEWAY CENTER, STE 751 NEWTON, MA 02458		CHARITY	150TH ANNIVERSARY OF GANDHI	6,100.
BAKERSFIELD HOMELESS CENTER 1600 EAST TRUXTUN AVENUE BAKERSFIELD, CA 93309		CHARITY	FOR HOMELESS AND POOR TO EQUIP THEM FOR SELF-SUFFICIENT & PRODUCTIVE FUTURE	30,000.
BAKERSFIELD POLICE ACTIVITIES LEAGUE 301 E 4TH STREET BAKERSFIELD, CA 93307		CHARITY	FOR ASSISTANCE IN ACTIVITIES FOR AT RISK YOUTH	10,000.
FOX THEATRE 2001 H ST BAKERSFIELD, CA 93301		CHARITY	DEPOSIT TO RESERVE THE THEATRE FOR SHOWING GANDHI	1,600.
Total	SEE CONTINUATION SHEET(S)			121,636.
b Approved for future payment				
NONE				
Total				0.

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 | | X |
| | (2) Other assets | | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | 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. | | |

[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
N/A		

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee: [Signature] Date: 11/16/2020 Title: PRESIDENT

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	GREGORY G. BRAUN	<i>Gregory G. Braun</i>	11-16-20		P00192870
	Firm's name ▶ CBIZ MHM, LLC			Firm's EIN ▶ 33-0737981	
	Firm's address ▶ 5060 CALIFORNIA AVE., SUITE 800 BAKERSFIELD, CA 93309			Phone no. 661-325-7500	

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PASSTHROUGH - THE BLACKSTONE GROUP L.P.	P		
b PASSTHROUGH - THE BLACKSTONE GROUP L.P.	P		
c PASSTHROUGH - BREP VII COMMERCIAL REAL ESTATE	P		
d PASSTHROUGH - BREP VII COMMERCIAL REAL ESTATE	P		
e PASSTHROUGH - FRANCISCO PARTNERS III (CAYMAN)	P		
f PASSTHROUGH - FRANCISCO PARTNERS III (CAYMAN)	P		
g PASSTHROUGH - FRANCISCO PARTNERS III	P		
h PASSTHROUGH - FRANCISCO PARTNERS III (DOMESTIC)	P		
i MERRILL LYNCH #4124	P		
j MERRILL LYNCH #4124	P		
k UBS #4430	P		
l UBS #4430	P		
m UBS #4381	P		
n CHARLES SCHWAB #8998	P		
o CHARLES SCHWAB #8998	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 1,986.			1,986.
b 28.			28.
c		178.	<178.>
d 201,483.			201,483.
e		13.	<13.>
f 117,676.			117,676.
g 9.			9.
h 40,919.			40,919.
i 54,203.		77,433.	<23,230.>
j 160,734.		184,108.	<23,374.>
k 227,753.		219,579.	8,174.
l 117,425.		108,838.	8,587.
m 19,710.		31,512.	<11,802.>
n 13,661,661.		12,873,755.	787,906.
o 3,953,310.		2,594,509.	1,358,801.

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

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			1,986.
b			28.
c			<178.>
d			201,483.
e			<13.>
f			117,676.
g			9.
h			40,919.
i			<23,230.>
j			<23,374.>
k			8,174.
l			8,587.
m			<11,802.>
n			787,906.
o			1,358,801.

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

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

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a CHARLES SCHWAB #6101	P		
b CHARLES SCHWAB #4729	P		
c CHARLES SCHWAB #8998	P		
d CATCH UP GAIN FOR BASIS ADJUSTMENTS	P		
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,256.			1,256.
b 886.			886.
c 19,569.			19,569.
d 142,074.			142,074.
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F M V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,256.
b			886.
c			19,569.
d			142,074.
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	2,630,757.
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 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
GLOBAL FAMILY CARE NETWORK 8701 SWIGERT CT BAKERSFIELD, CA 93311		CHARITY	FOR INITIATIVES TO SUPPORT CHILDREN WHO ARE VICTIMS OF POVERTY, EXPLOITATION, AND ABUSE.	500.
HEAVEN ON EARTH CREATIONS 7 MIMOSA ROAD SANTE FE, NM 87508		CHARITY	GENERAL SUPPORT	250.
MEXICAN AMERICAN OPPORTUNITY FOUNDATION 2130 CHESTER AVENUE, SUITE 200 BAKERSFIELD, CA 93301		CHARITY	TO PROVIDE SOCIO-ECONOMIC BETTERMENT OF THE GREATER LATINO COMMUNITY OF	5,000.
NO PAWS LEFT BEHIND PO BOX 20970 BAKERSFIELD, CA 93390		CHARITY	TO SAVE ADOPTABLE ANIMALS FROM KERN COUNTY SHELTERS WHO ARE IN DANGER OF BEING EUTHANIZED DUE TO	2,000.
KERN COALITION AGAIST HUMAN TRAFFICKING 5405 STOCKDALE HWY, STE 200 BAKERSFIELD, CA 93309		CHARITY	TO COMBAT HUMAN TRAFFICKING IN KERN COUNTY THROUGH PREVENTION, PROTECTION,	1,000.
BAKERSFIELD COLLEGE FOUNDATION 1801 PANORAMA DR. BAKERSFIELD, CA 93305		CHARITY	TO EXPAND ACCESS AND OPPORTUNITY FOR STUDENTS OF ALL AGES; IMPROVE THE QUALITY AND DIVERSITY OF	6,755.
CSUB FOUNDATION 9001 STOCKDALE HWY BAKERSFIELD, CA 93311		CHARITY	GENERAL SUPPORT	1,946.
GIRL SCOUTS OF CENTRAL CALIFORNIA 1831 BRUNDAGE LN BAKERSFIELD, CA 93304		CHARITY	TO BUILD GIRLS COURAGE, CONFIDENCE, AND CHARACTER TO MAKE THE WORLD A BETTER PLACE	5,000.
CALIFORNIA STATE UNIVERSITY FRESNO FOUNDATION 4910 N. CHESTNUT AVE FRESNO, CA 93726		CHARITY	GENERAL SUPPORT	2,500.
MLK RESEARCH AND EDUCATION INSTITUTE AT STANFORD UNIVERSITY 466 VIA ORTEGA WAY STANDFORD, CA 94305		CHARITY	ENSURE THAT FUTURE GENERATIONS UNDERSTAND KING'S LIFE AND HIS SIGNIFICANCE IN THE GLOBAL STRUGGLE FOR	2,500.
Total from continuation sheets				43,936.

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
TIDES FOUNDATION PO BOX 29903 SAN FRANCISCO, CA 94129		CHARITY	SMART JUSTICE CALIFORNIA EDUCATION FUND	5,000.
BROKEN VESSEL MINISTRIES 2705 DEERBROOK ST BAKERSFIELD, CA 93308		CHARITY	TO PROMOTE THE GOSPEL OF THE LORD JESUS CHRIST IN SERVICE TO ALL MANKIND	500.
VOLUNTEER CENTER OF KERN COUNTY 1311 EYE ST BAKERSFIELD, CA 93301		CHARITY	TO MOBILIZE PEOPLE AND RESOURCES TO DELIVER CREATIVE SOLUTIONS TO ADDRESS COMMUNITY ISSUES THROUGH	1,000.
COMMUNITY ACTION PARTNERSHIP OF KERN 5005 BUSINESS PARK NORTH BAKERSFIELD, CA 93309		CHARITY	PROVIDE/ADVOCATE FOR RESOURCES THAT WILL EMPOWER MEMBERS OF THE COMMUNITY WE SERVE TO BE SELF-SUFFICIENT	1,000.
GANDHI ESSAY CONTEST - BAKERSFIELD COLLEGE EVENT 1801 PANORAMA DR. BAKERSFIELD, CA 93305		CHARITY	GENERAL SUPPORT	1,600.
MANAV SADHNA GANDHI ASHRAM AHMEDABAD, GUJARAT, INDIA 380027		CHARITY	GENERAL SUPPORT	3,385.
SHRINERS HOSPITAL FOR CHILDREN 909 S. FAIR OAKS AVE. PASADENA, CA 91105		CHARITY	PROVIDE PEDIATRIC SPECIALTY CARE WITHOUT FINACIAL OBLIGATION TO PATIENTS OR THEIR FAMILIES	2,000.
BUENA VISTA EDIBLE SCHOOL YARD 11001 RIVER RUN BLVD, NO 101 BAKERSFIELD, CA 93311		CHARITY	GENERAL SUPPORT	2,000.
Total from continuation sheets				

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - MEXICAN AMERICAN OPPORTUNITY FOUNDATION

TO PROVIDE SOCIO-ECONOMIC BETTERMENT OF THE GREATER LATINO COMMUNITY OF
CALIFORNIA

NAME OF RECIPIENT - NO PAWS LEFT BEHIND

TO SAVE ADOPTABLE ANIMALS FROM KERN COUNTY SHELTERS WHO ARE IN DANGER
OF BEING EUTHANIZED DUE TO OVERCROWDED FACILITIES

NAME OF RECIPIENT - KERN COALITION AGAIST HUMAN TRAFFICKING

TO COMBAT HUMAN TRAFFICKING IN KERN COUNTY THROUGH PREVENTION,
PROTECTION, PROSECUTION AND PARTNERSHIP

NAME OF RECIPIENT - BAKERSFIELD COLLEGE FOUNDATION

TO EXPAND ACCESS AND OPPORTUNITY FOR STUDENTS OF ALL AGES; IMPROVE THE
QUALITY AND DIVERSITY OF INSTRUCTIONAL OFFERINGS; SUPPORT THE
PROFESSIONAL DEVELOPMENT OF AN OUTSTANDING FACULTY AND STAFF; PURCHASE
LEADING-EDGE TECHNOLOGY FOR CLASSROOMS AND LEARNING LABORATORIES; AND
ENHANCE COLLEGE FACILITIES TO CREATE AN EFFICIENT AND STIMULATING
LEARNING ENVIRONMENTNAME OF RECIPIENT - MLK RESEARCH AND EDUCATION INSTITUTE AT STANFORD
UNIVERSITYENSURE THAT FUTURE GENERATIONS UNDERSTAND KING'S LIFE AND HIS
SIGNIFICANCE IN THE GLOBAL STRUGGLE FOR PEACE, JUSTICE, AND
RECONCILIATION

NAME OF RECIPIENT - VOLUNTEER CENTER OF KERN COUNTY

TO MOBILIZE PEOPLE AND RESOURCES TO DELIVER CREATIVE SOLUTIONS TO

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

ADDRESS COMMUNITY ISSUES THROUGH VOLUNTEERISM

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

RAVI AND NAINA PATEL FOUNDATION

Employer identification number

77-0490360

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	Employer identification number
RAVI AND NAINA PATEL FOUNDATION	77-0490360

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	RAVI PATEL, M.D. INC. DBA CBCC 6501 TRUXTON AVENUE BAKERSFIELD, CA 93309	\$ 1,500,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

Employer identification number

RAVI AND NAINA PATEL FOUNDATION

77-0490360

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
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization	Employer identification number
RAVI AND NAINA PATEL FOUNDATION	77-0490360

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST FROM BANKS/INVESTMENTS	31,354.	31,329.	
TOTAL TO PART I, LINE 3	31,354.	31,329.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDEND INCOME FROM INVESTMENTS	135,235.	0.	135,235.	135,235.	
NONDIVIDEND DISTRIBUTIONS	7,919.	0.	7,919.	7,919.	
TO PART I, LINE 4	143,154.	0.	143,154.	143,154.	

FORM 990-PF RENTAL INCOME STATEMENT 3

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
NET RENTAL REAL ESTATE LOSS FROM PASSTHRUS	1	<35,625.>
TOTAL TO FORM 990-PF, PART I, LINE 5A		<35,625.>

FORM 990-PF

INCOME AND COST OF GOODS SOLD
INCLUDED ON PART I, LINE 10

STATEMENT 4

INCOME

1. GROSS RECEIPTS	484,007	
2. RETURNS AND ALLOWANCES		
3. LINE 1 LESS LINE 2		484,007
4. COST OF GOODS SOLD (LINE 15)	204,248	
5. GROSS PROFIT (LINE 3 LESS LINE 4).		279,759
6. OTHER INCOME		
7. GROSS INCOME (ADD LINES 5 AND 6)		279,759

COST OF GOODS SOLD

8. INVENTORY AT BEGINNING OF YEAR		
9. MERCHANDISE PURCHASED.		
10. COST OF LABOR.		
11. MATERIALS AND SUPPLIES		
12. OTHER COSTS.	204,248	
13. ADD LINES 8 THROUGH 12		204,248
14. INVENTORY AT END OF YEAR		
15. COST OF GOODS SOLD (LINE 13 LESS LINE 14).		204,248

FORM 990-PF	COST OF GOODS SOLD - OTHER COSTS	STATEMENT 5
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DESCRIPTION	AMOUNT
FOOD PURCHASES	173,707.
SUPPLIES	30,541.
TOTAL OTHER COSTS	204,248.

FORM 990-PF	OTHER INCOME	STATEMENT 6
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ROYALTIES FROM PASSTHROUGHS	32.	32.	
OTHER INCOME FROM PASSTHROUGHS	47,183.	47,183.	
SECTION 1231 GAIN FROM PASSTHROUGHS	25,994.	25,751.	
ORDINARY INCOME FROM PASSTHROUGHS	<1,254.>	995.	
TOTAL TO FORM 990-PF, PART I, LINE 11	71,955.	73,961.	

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT 7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	2,000.	0.		0.
TO FORM 990-PF, PG 1, LN 16C	2,000.	0.		0.

FORM 990-PF	TAXES	STATEMENT 8
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE TAXES	10.	0.		0.
FOREIGN TAXES	24.	0.		0.
OTHER TAXES	511.	0.		0.
TO FORM 990-PF, PG 1, LN 18	545.	0.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 9

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	21,304.	21,304.		0.
INVESTMENT INTEREST EXPENSE	1,385.	1,385.		0.
COMMUNITY AWARENESS/DINNER FOR HOMELESS	16,842.	0.		16,842.
NONDEDUCTIBLE EXPENSES FROM PASSTHROUGHS	952.	952.		0.
OTHER EXPENSES - UBIT	287,148.	0.		0.
MISCELLANEOUS EXPENSE	1,258.	0.		0.
OTHER EXPENSES FROM PASSTHROUGHS	28,666.	28,666.		0.
BANK SERVICE CHARGES	182.	182.		0.
SUPPLIES	672.	0.		672.
PRINTING AND REPRODUCTION	2,289.	0.		2,289.
OUTSIDE SERVICES	42,693.	0.		35,865.
60% CHARITABLE CONTRIBUTIONS FROM PASSTHROUGHS	49.	0.		0.
TO FORM 990-PF, PG 1, LN 23	403,440.	52,489.		55,668.

FORM 990-PF

OTHER FUNDS

STATEMENT 10

DESCRIPTION	(A) BEGINNING OF YEAR	(B) END OF YEAR
RETAINED EARNINGS/ACCUMULATED INCOME	15,457,105.	19,557,232.
TOTAL TO FORM 990-PF, PART II, LINE 29	15,457,105.	19,557,232.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 11	
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
AKIDO LABS	COST	250,000.	250,000.
BREP VII COMMERCIAL REAL ESTATE TRUST	COST	428,869.	409,882.
CHARLES SCHWAB - 8998	COST	11,711,853.	14,676,934.
EDUCATION LOANS	COST	600,958.	600,958.
FRANCISCO PARTNERS III - CAYMAN LP	COST	98,631.	372,664.
FRANCISCO PARTNERS III - DOMESTIC AIV L.P.	COST	34,779.	170,891.
FRANCISCO PARTNERS III LP	COST	98,209.	224,796.
JP MORGAN - 2255	COST	460,619.	645,445.
MERRILL LYNCH - 4124	COST	1,359,756.	2,247,967.
OLYMPUS V LLC	COST	17,935.	17,935.
OLYMPUS VI LLC	COST	31,350.	31,350.
PRESERVE INVESTORS LLC	COST	<22,448.>	<22,448.>
UBS - 4381	COST	311,862.	764,850.
WW CAPEHOUSE INVESTORS	COST	55,737.	55,737.
WW MULTISTATE PROPERTIES I LLC - OLYMPUS PROPERTY	COST	<118,214.>	<112,422.>
WW OLYMPUS PROPERTY IV LLC	COST	99,850.	99,850.
WW ROSEMEADE INVESTORS	COST	<8,077.>	<8,077.>
WW MULTISTATE TRADEWINDS, LLC	COST	25,486.	25,486.
WW OLYMPUS OPPORTUNITY FUND II, LLC	COST	134,155.	134,155.
ROCKET GLOBAL INNOVATION FUND	COST	22,500.	22,500.
TOTAL TO FORM 990-PF, PART II, LINE 13		15,593,810.	20,608,453.

FORM 990-PF	OTHER LIABILITIES	STATEMENT 12	
DESCRIPTION		BOY AMOUNT	EOY AMOUNT
DUE TO CBCC FOUNDATION		853.	0.
NOTE PAYABLE		332,594.	0.
DUE TO EFFORTLESS STRENGTH		82,949.	0.
TOTAL TO FORM 990-PF, PART II, LINE 22		416,396.	0.