29491030049141

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 1545-0047 **2019** Open to Public Inspection

For calendar year 2019 or tax year beginning JAN 9, 2019 , and ending DEC 31, 2019

Name of foundation: RONALD W NAITO MD FOUNDATION

A Employer identification number: 83-6622391

Number and street (or P O box number if mail is not delivered to street address): 25 N.W. 23RD PLACE — Room/suite: 6-152

B Telephone number: (503) 294-9440

City or town, state or province, country, and ZIP or foreign postal code: PORTLAND, OR 97210

C If exemption application is pending, check here ▶ [ ]

6

G Check all that apply: [X] 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: [X] Section 501(c)(3) exempt private foundation [ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

04

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 39,480,645.

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

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

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03 / 04

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

	Line	(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	39,725,674.		N/A	
	2 Check ▶ [ ] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,605.	1,605.		STATEMENT 1
	4 Dividends and interest from securities	730,287.	730,287.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-3,262.			
	b Gross sales price for all assets on line 6a 642,482.				
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 Total Add lines 1 through 11	40,454,304.	731,892.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	9,640.	96.		9,544.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees STMT 3	50,371.	50,371.		0.
	17 Interest				
	18 Taxes STMT 4	3,123.	3,123.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	65.	0.		65.
	22 Printing and publications				
	23 Other expenses STMT 5	3,995.	0.		3,995.
	24 Total operating and administrative expenses Add lines 13 through 23	67,194.	53,590.		13,604.
	25 Contributions, gifts, grants paid	2,447,800.			2,447,800.
	26 Total expenses and disbursements Add lines 24 and 25	2,514,994.	53,590.		2,461,404.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	37,939,310.			
	b Net investment income (if negative, enter -0-)		678,302.		
	c Adjusted net income (if negative, enter -0-)			N/A	

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Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing		338,910.	338,910.
	2 Savings and temporary cash investments		7,550,000.	7,550,000.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 6	0.	6,201,443.	6,201,443.
	b Investments - corporate stock STMT 7	0.	11,562,429.	11,562,429.
	c Investments - corporate bonds STMT 8	0.	5,330,217.	5,330,217.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 9	0.	8,497,646.	8,497,646.
	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)	0.	39,480,645.	39,480,645.
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			
	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	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	0.	39,480,645.	
	29 **Total net assets or fund balances**	0.	39,480,645.	
	30 **Total liabilities and net assets/fund balances**	0.	39,480,645.	

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	0.
2	Enter amount from Part I, line 27a	2	37,939,310.
3	Other increases not included in line 2 (itemize) ▶ UNREALIZED GAIN	3	1,541,335.
4	Add lines 1, 2, and 3	4	39,480,645.
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	39,480,645.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	PUBLICLY TRADED SECURITIES			
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	642,482.		645,744.	-3,262.
b				
c				
d				
e				

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				-3,262.
b				
c				
d				
e				

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	-3,262.
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	-3,262.

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.) N/A

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			
2017			
2016			
2015			
2014			

2	**Total** of line 1, column (d)	2	
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	
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	
5	Multiply line 4 by line 3	5	
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	
7	Add lines 5 and 6	7	
8	Enter qualifying distributions from Part XII, line 4	8	

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	13,566.
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	13,566.
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	13,566.
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 ☐ if Form 2220 is attached			8	515.
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	14,081.
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** ▶ **Refunded** ▶			11	

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0. **(2)** On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T.*	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		X
7 Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ OR			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G?* If "No," attach explanation	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STMT 10	10	X	

2

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ WWW.RWNFOUNDATION.ORG

14 The books are in care of ▶ GARY MCGEE & CO. LLP Telephone no. ▶ (503) 222-2515

Located at ▶ 1000 S.W. BROADWAY, SUITE 1200, PORTLAND, OR ZIP+4 ▶ 97205

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

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

			Yes	No
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶			

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

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

				Yes	No
1a	During the year, did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions		1b		X
	Organizations relying on a current notice regarding disaster assistance, check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years ▶ ______, ______, ______, ______	☐ Yes ☒ No			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ______, ______, ______, ______				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2019 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		4b		X

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RONALD W. NAITO, MD 25 N.W. 23RD PLACE, SUITE 6-152 PORTLAND, OR 97210	FOUNDER AND TRUSTEE 5.00	0.	0.	0.
ELIZABETH ANDERSON 25 N.W. 23RD PLACE, SUITE 6-152 PORTLAND, OR 97210	PRESIDENT/TRUSTEE 5.00	0.	0.	0.
ANNE NAITO-CAMPBELL 25 N.W. 23RD PLACE, SUITE 6-152 PORTLAND, OR 97210	TRUSTEE 2.00	0.	0.	0.
KRISTIN ANDERSON 25 N.W. 23RD PLACE, SUITE 6-152 PORTLAND, OR 97210	TRUSTEE AND EXECUTIVE DIRECTOR 8.00	9,640.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
BECKER CAPITAL MANAGEMENT INC - 1211 S.W. 5TH AVENUE, SUITE 2185, PORTLAND, OR 97204	INVESTMENT MANAGEMENT	50,371.
Total number of others receiving over $50,000 for professional services ▶		0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities		1a	12,514,136.
b	Average of monthly cash balances		1b	13,430,293.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	25,944,429.
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	25,944,429.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	389,166.
5	**Net value of noncharitable-use assets**. Subtract line 4 from line 3. Enter here and on Part V, line 4		5	25,555,263.
6	**Minimum investment return** Enter 5% of line 5 ADJUSTED FOR SHORT TAX PERIOD		6	1,249,755.

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

1	Minimum investment return from Part X, line 6		1	1,249,755.
2a	Tax on investment income for 2019 from Part VI, line 5	2a 13,566.		
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	13,566.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	1,236,189.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	1,236,189.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	1,236,189.

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	2,461,404.
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	2,461,404.
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	2,461,404.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				1,236,189.
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				
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: ▶ $ 2,461,404.				
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				1,236,189.
e Remaining amount distributed out of corpus	1,225,215.			
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	1,225,215.			
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	1,225,215.			
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 1,225,215.				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

RONALD W. NAITO, MD

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

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

SEE STATEMENT 11

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

c Any submission deadlines:

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

Part XV Supplementary Information *(continued)*

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
THE 4TH DIMENSION RECOVERY CENTER 3807 N.E. MLK JR. BLVD PORTLAND, OR 97212		PC	GENERAL OPERATING SUPPORT	20,000.
ALLIANCE FOR HOPE INTERNATIONAL 101 W. BROADWAY, SUITE 1770 SAN DIEGO, CA 92101		PC	GENERAL OPERATING SUPPORT	20,000.
APANO COMMUNITIES UNITED FUND 8188 S.E. DIVISION STREET PORTLAND, OR 97206		PC	CAPACITY BUILDING	20,000.
APANO COMMUNITIES UNITED FUND/OREGON HEALTH EQUITY ALLIANCE 8188 S.E. DIVISION STREET PORTLAND, OR 97266		PC	GENERAL OPERATING SUPPORT	10,000.
AUGUST WILSON RED DOOR PROJECT 6344 N. CURTIS AVENUE PORTLAND, OR 97217		PC	PROGRAM SUPPORT	25,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	2,447,800.
b *Approved for future payment* NONE				
Total			▶ 3b	0.

Form **990-PF** (2019)

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Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	1,605.	
4 Dividends and interest from securities			14	730,287.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	-3,262.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		728,630.	0.

13 Total Add line 12, columns (b), (d), and (e) 13 728,630.

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

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

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

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

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

KL [signature] 7/6/20 Trustee

Signature of officer or trustee | Date | Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
GARY MCGEE	[signature]	6/17/20		P00743279

Firm's name ▶ GARY MCGEE & CO. LLP

Firm's EIN ▶

Firm's address ▶ 1000 S.W. BROADWAY, SUITE 1200
PORTLAND, OR 97205

Phone no. (503) 222-2515

Form **990-PF** (2019)

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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
BLACK EDUCATION ACHIEVEMENT MOVEMENT 4106 N.E. CLEVELAND AVENUE PORTLAND, OR 97212		PC	GENERAL OPERATING SUPPORT	10,000.
CAPACES LEADERSHIP INSTITUTE 356 YOUNG STREET WOODBURN, OR 97071		PC	GENERAL OPERATING SUPPORT	15,000.
CENTRAL CITY CONCERN 232 N.W. 6TH AVENUE PORTLAND, OR 97209		PC	GENERAL OPERATING SUPPORT	250.
CLACKAMAS SERVICE CENTER 8800 S.E. 80TH AVENUE PORTLAND, OR 97206		PC	GENERAL OPERATING SUPPORT	30,000.
DOCTORS WITHOUT BORDERS/MEDECINS SANS FRONTIERES 40 RECTOR STREET, 16TH FLOOR NEW YORK, NY 10006		PC	GENERAL OPERATING SUPPORT	46,000.
EARTHRIGHTS 1612 K STREET NW, SUITE 800 WASHINGTON, DC 20006		PC	GENERAL OPERATING SUPPORT	15,000.
ECOLOGY IN CLASSROOMS AND OUTDOORS P.O. BOX 90293 PORTLAND, OR 97290		PC	GENERAL OPERATING SUPPORT	10,000.
EDEN REFORESTATION PROJECT 303 W. FOOTHILL BLVD, UNIT 13 GLENDORA, CA 91741		PC	PROGRAM SUPPORT	35,000.
ENVIRONMENTAL INGERITY PROJECT 1000 VERMONT AVENUE NW, SUITE 1100 WASHINGTON, DC 20005		PC	GENERAL OPERATING SUPPORT	20,000.
FAMILIAS EN ACCION 2710 N.E. 14TH AVENUE PORTLAND, OR 97212		PC	PROGRAM SUPPORT	20,000.
Total from continuation sheets				2,352,800.

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
FAMILY OF FRIENDS MENTORING 1333 N.W. EASTMAN PARKWAY GRESHAM, OR 97030		PC	CAPACITY BUILDING	12,000.
FOUR RIVERS CULTURAL CENTER AND MUSEUM 676 S.W. 5TH AVENUE ONTARIO, OR 97914		PC	PROGRAM SUPPORT	25,000.
GIFFORDS LAW CENTER TO PREVENT GUN VIOLENCE 268 BUSH STREET, #555 SAN FRANCISCO, CA 94104		PC	GENERAL OPERATING SUPPORT	5,000.
GLOBAL PARTNERS IN CARE, INC. 501 COMFORT PLACE MISHAWAKA, IN 46545		PC	CAPACITY BUILDING	10,000.
GUARDIAN PARTNERS 10814 N.E. HALSEY STREET PORTLAND, OR 97220		PC	CAPACITY BUILDING	25,000.
HIMALAYAN CATARACT PROJECT, INC P.O. BOX 55 WATERBURY, VT 05676		PC	GENERAL OPERATING SUPPORT	50,000.
INDEPENDENT PUBLISHING RESOURCE CENTER, INC. 318 S.E. MAIN STREET, SUITE 155 PORTLAND, OR 97214		PC	PROGRAM SUPPORT	10,000.
JANUS YOUTH PROGRAMS, INC. 707 N.E. COUCH STREET PORTLAND, OR 97232		PC	PROGRAM SUPPORT	20,000.
JOSEPHY CENTER FOR ARTS AND CULTURE P.O. BOX 949 JOSEPH, OR 97846		PC	PROGRAM SUPPORT	20,000.
MARINE CONSERVATION INSTITUTE 4010 STONE WAY N, SUITE 210 SEATTLE, WA 98103		PC	GENERAL OPERATING SUPPORT	25,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MAYBELLE CENTER FOR COMMUNITY 121 N.W. SIXTH AVENUE PORTLAND, OR 97209		PC	GENERAL OPERATING SUPPORT	25,000.
MULTICULTURAL INTEGRATED KIDNEY EDUCATION PROGRAM 9155 S.W. BARNES ROAD, SUITE 219 PORTLAND, OR 97225		PC	GENERAL OPERATING SUPPORT	15,000.
MUSIC WORKSHOP 4804 S.W. SCHOLLS FERRY ROAD PORTLAND, OR 97225		PC	PROGRAM SUPPORT	20,000.
NAITO-MCANULTY OHSU/PSU P.O. BOX 29017 PORTLAND, OR 97209		GOV	GENERAL OPERATING SUPPORT	50,000.
NATIVE AMERICAN YOUTH AND FAMILY CENTER 5135 N.E. COLUMBIA BLVD PORTLAND, OR 97218		PC	PROGRAM SUPPORT	20,000.
NORTHWEST CHILDREN'S THEATER AND SCHOOL, INC. 1819 N.W. EVERETT PORTLAND, OR 97209		PC	GENERAL OPERATING SUPPORT	50,000.
OCEAN CONSERVANCY INC. 1300 19TH STREET NW, 8TH FLOOR WASHINGTON, DC 20036		PC	GENERAL OPERATING SUPPORT	10,000.
OPEN HEARTS OPEN MINDS P.O. BOX 4534, UNIT 403 PORTLAND, OR 97208		PC	CAPACITY BUILDING	35,000.
OREGON COMMUNITY FOUNDATION 1221 S.W. YAMHILL, SUITE 100 PORTLAND, OR 97205		PC	GENERAL OPERATING SUPPORT	1,000,000.
OREGON HEALTH CARE INTREPRETERS ASSOCIATION 9220 S.W. BARBUR BLVD., SUITE 119-315 PORTLAND, OR 97219		PC	CAPACITY BUILDING	15,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
OREGON PUBLIC BROADCASTING 7140 S.W. MACADAM AVENUE PORTLAND, OR 97219		PC	CAPACITY BUILDING	50,000.
OREGON SCHOOL-BASED HEALTH ALLIANCE 911 N.E. DAVIS STREET PORTLAND, OR 97232		PC	CAPACITY BUILDING	25,000.
OREGON TRADESWOMAN 3934 N.E. MARTIN LUTHER KING JR. BLVD, SUITE 101 PORTLAND, OR 97212		PC	PROGRAM SUPPORT	20,000.
OHSU CENTER FOR ETHICS P.O. BOX 29017 PORTLAND, OR 97296		GOV	GENERAL OPERATING SUPPORT	100,000.
PLAYA 47531 HIGHWAY 31 SUMMER LAKE, OR 97640		PC	GENERAL OPERATING SUPPORT	10,000.
POINT BLUE CONSERVATION SCIENCE 3820 CYPRESS DRIVE, SUITE 11 PETALUMA, CA 94954		PC	PROGRAM SUPPORT	25,000.
PORTLAND STREET MEDICINE 825 N.E. MULTNOMAH STREET, SUITE 240 PORTLAND, OR 97232		PC	CAPACITY BUILDING	50,000.
PORTLAND TAIKO 3728 S.E. 34TH AVENUE PORTLAND, OR 97202		PC	PROGRAM SUPPORT	5,000.
PROFILE THEATRE PROJECT P.O. BOX 14845 PORTLAND, OR 97293		PC	GENERAL OPERATING SUPPORT	50,000.
PROFILE THEATRE PROJECT P.O. BOX 14845 PORTLAND, OR 97293		PC	GENERAL OPERATING SUPPORT	2,500.
Total from continuation sheets				

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04-01-19

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PROFILE THEATRE PROJECT P.O. BOX 14845 PORTLAND, OR 97293		PC	GENERAL OPERATING SUPPORT	1,000.
PSU CHAMBER CHOIR 1600 S.W. FOURTH AVENUE, SUITE 730 PORTLAND, OR 97201		PC	GENERAL OPERATING SUPPORT	1,750.
ROCKY MOUNTAIN INSTITUTE 2490 JUNCTION PLACE, SUITE 200 BOULDER, CO 80301		PC	GENERAL OPERATING SUPPORT	50,000.
ROGUE VALLEY FARM TO SCHOOL P.O. BOX 898 ASHLAND, OR 97520		PC	GENERAL OPERATING SUPPORT	15,000.
SEXUAL ASSAULT RESOURCE CENTER 4900 S.W. GRIFFITH, SUITE 100 BEAVERTON, OR 97005		PC	PROGRAM SUPPORT	17,300.
SIGNAL FIRE 5205 N.E. 19TH PORTLAND, OR 97211		PC	CAPACITY BUILDING	10,000.
SITKA CENTER FOR ART AND ECOLOGY 56605 SITKA DRIVE OTIS, OR 97368		PC	CAPITAL CAMPAIGN	10,000.
STORE TO DOOR 7730 S.W. 31ST AVENUE PORTLAND, OR 97219		PC	GENERAL OPERATING SUPPORT	12,000.
THE PORTLAND CLINIC FOUNDATION 800 S.W. 13TH AVENUE PORTLAND, OR 97205		PC	GENERAL OPERATING SUPPORT	30,000.
THE PSU FOUNDATION 1600 S.W. 4TH AVENUE, SUITE 730 PORTLAND, OR 97201		PC	PROGRAM SUPPORT	35,000.
Total from continuation sheets				

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04-01-19

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE SALEM-KEIZER COALTION FOR EQUALITY 3850 PORTLAND ROAD, N.E., SUITE 100 SALEM, OR 97301		PC	GENERAL OPERATING SUPPORT	15,000.
THE SHADOW PROJECT 2154 N.E. BROADWAY, #130 PORTLAND, OR 97232		PC	CAPACITY BUILDING	20,000.
THE TIDES CENTER/EYELLIANCE P.O. BOX 29907 SAN FRANCISCO, CA 94129		PC	CAPACITY BUILDING	15,000.
UNIVERSITY OF WASHINGTON CARBON LEADERSHIP FORUM UNIVERSITY OF WASHINGTON, BOX 355720 SEATTLE, WA 98195		GOV.	CAPACITY BUILDING	100,000.
WALLOWA RESOURCES 401 N.E. 1 STREET, SUITE A ENTERPRISE, OR 97828		PC	GENERAL OPERATING SUPPORT	30,000.
WRITE AROUND PORTLAND 133 S.W. 2ND AVENUE, SUITE 304 PORTLAND, OR 97204		PC	PROGRAM SUPPORT	10,000.
Total from continuation sheets				

923631
04-01-19

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	Employer identification number
RONALD W NAITO MD FOUNDATION	83-6622391

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
RONALD W NAITO MD FOUNDATION	83-6622391

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	RONALD W. NAITO, MD 2705 N.W. WESTOVER ROAD PORTLAND, OR 97210	$ 39,725,674.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
RONALD W NAITO MD FOUNDATION	83-6622391

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
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

Name of organization: RONALD W NAITO MD FOUNDATION

Employer identification number: 83-6622391

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of $1,000 or less for the year (Enter this info. once.) ▶ $

Use duplicate copies of Part III if additional space is needed

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
CHARLES SCHWAB	1,605.	1,605.	0.
TOTAL TO PART I, LINE 3	1,605.	1,605.	0.

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
CHARLES SCHWAB	730,287.	0.	730,287.	730,287.	0.
TO PART I, LINE 4	730,287.	0.	730,287.	730,287.	0.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES - BECKER CAPITAL MANAGEMENT	50,371.	50,371.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	50,371.	50,371.	0.	0.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	3,123.	3,123.	0.	0.
TO FORM 990-PF, PG 1, LN 18	3,123.	3,123.	0.	0.

FORM 990-PF OTHER EXPENSES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
IRS EXEMPTION APPLICATION FEES	600.	0.		600.
INFORMATION TECHNOLOGY	2,977.	0.		2,977.
TRAINING	150.	0.		150.
OFFICE EXPENSES	268.	0.		268.
TO FORM 990-PF, PG 1, LN 23	3,995.	0.		3,995.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 6

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US TREASURY BILL20	X		334,627.	334,627.
US TREASUR NT 2.25%02/20	X		300,281.	300,281.
US TREASUR NT 3.5%05/20	X		453,023.	453,023.
US TREASURY BILL20	X		990,418.	990,418.
US TREASU NT 1.375%09/20	X		429,261.	429,261.
US TREASU NT 1.625%11/20	X		324,898.	324,898.
US TREASU NU 2.375%04/21	X		403,813.	403,813.
US TREASU NT 2.125%08/21	X		55,447.	55,447.
US TREASUR NT 1.75%11/21	X		350,984.	350,984.
US TREASUR NT 2%02/22	X		100,797.	100,797.
US TREASUR NT 2%07/22	X		429,184.	429,184.
US TREASUR NT 2%10/22	X		702,276.	702,276.
US TREASUR NT 2%11/22	X		338,559.	338,559.
US TREASUR NT 2.75%11/23	X		624,094.	624,094.
US TREASURY 2.375%05/29	X		363,781.	363,781.
TOTAL U.S. GOVERNMENT OBLIGATIONS			6,201,443.	6,201,443.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			6,201,443.	6,201,443.

FORM 990-PF CORPORATE STOCK STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AT&T INC	309,318.	309,318.
AMERICAN INTL GROUP	276,412.	276,412.
APPLE INC	449,284.	449,284.
AVNET INC	200,529.	200,529.
BAKER HUGHES CO.	337,675.	337,675.
CIENA CORP	198,722.	198,722.
CISCO SYSTEMS INC	407,660.	407,660.
CITIGROUP INC	340,731.	340,731.
DANONE	273,734.	273,734.
DISCOVERY INC	340,726.	340,726.
EMBRAER S A	189,930.	189,930.
EXTENDED STAY AMERICA IN	307,676.	307,676.
EXXON MOBIL CORP	284,353.	284,353.
FEDEX CORP	195,817.	195,817.
FORD MOTOR CO	202,647.	202,647.
GILEAD SCIENCES INC	392,154.	392,154.
GOLDMAN SACHS GROUP	227,631.	227,631.
HOWARD HUGHES CORP	342,360.	342,360.
HP INC.	320,888.	320,888.
INTEL CORP	201,994.	201,994.
INTERNTNL PAPER	192,259.	192,259.
JM SMUCKER CO	199,930.	199,930.
JP MORGAN CHASE & CO	353,379.	353,379.
JOHNSON & JOHNSON	412,812.	412,812.
KEYCORP INC	215,252.	215,252.
KROGER CO	336,864.	336,864.
LEGGETT & PLATT INC	212,724.	212,724.
MAGNA INTL INC	187,827.	187,827.
MCKESSON CORP	191,573.	191,573.
METHANEX CORP	218,858.	218,858.
MOLSON COORS BREWING	281,089.	281,089.
NEWMONT GOLDCORP CORP	213,340.	213,340.
PFIZER INC	291,107.	291,107.
QUEST DIAGNOSTIC INC	291,003.	291,003.
ROYAL DUTCH SHELL	373,343.	373,343.
SIEMENS A G	231,293.	231,293.
SOUTHERN CO	218,172.	218,172.
SOUTHWEST AIRLINES	192,439.	192,439.
THE MOSAIC CO	236,525.	236,525.
U S BANCORP	200,104.	200,104.
VODAFONE GROUP	283,378.	283,378.
WALT DISNEY CO	216,945.	216,945.
WELLS FARGO BK NA	211,972.	211,972.
TOTAL TO FORM 990-PF, PART II, LINE 10B	11,562,429.	11,562,429.

FORM 990-PF CORPORATE BONDS STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AMERICAN EXPRESS	50,171.	50,171.
AMGEN INC.	454,772.	454,772.
ALLY FINL INC.	55,397.	55,397.
APPLE INC.	329,970.	329,970.
CATEPILLAR INC.	461,922.	461,922.
JOHN DEERE CAPIT	56,006.	56,006.
ORACLE CORP	329,635.	329,635.
MERCK & CO., INC.	349,804.	349,804.
SUNTRUST BANK	56,313.	56,313.
BERSHIRE HATHWAY	51,339.	51,339.
SIMON PROPERTY G	341,969.	341,969.
THE ALLSTATE CORP	347,648.	347,648.
NIKE, INC.	340,454.	340,454.
MORGAN STANLEY	345,082.	345,082.
INTEL CORP	343,714.	343,714.
CVS HEALTH CORP	354,205.	354,205.
KEYCORP	354,615.	354,615.
DUKE ENERGY PROGRAM	354,552.	354,552.
TARGET CORP	352,649.	352,649.
TOTAL TO FORM 990-PF, PART II, LINE 10C	5,330,217.	5,330,217.

FORM 990-PF OTHER INVESTMENTS STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ISHARES CORE S&P SMALL	FMV	296,410.	296,410.
DODGE & COX INTL STOCK	FMV	3,936,191.	3,936,191.
HARDING LOEVNER INTL	FMV	4,032,505.	4,032,505.
WEYERHAEUSER CO	FMV	232,540.	232,540.
TOTAL TO FORM 990-PF, PART II, LINE 13		8,497,646.	8,497,646.

FORM 990-PF LIST OF SUBSTANTIAL CONTRIBUTORS STATEMENT 10
PART VII-A, LINE 10

NAME OF CONTRIBUTOR	ADDRESS
RONALD W. NAITO, MD	2705 N.W. WESTOVER ROAD PORTLAND, OR 97210

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 11
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

APPLICATIONS ARE ACCEPTED THROUGH OUR ONLINE GRANT SYSTEM:

HTTPS://WWW.GRANTINTERFACE.COM/HOME/LOGON?URLKEY=RWNMD

FORM AND CONTENT OF APPLICATIONS

APPLICANTS MUST FIRST COMPLETE A LETTER OF INQUIRY (LOI). THE LOI NEEDS TO INLCUDE THE ORGANIZATIONS MISSION, NEED AND REQUEST FOR FUNDS. ONCE THE LOI HAS BEEN ACCEPTED, A FULL APPLICATION CAN BE COMPLETED ON THE FOUNDATION'S WEBSITE. THE FULL APPLICATION SHOULD INCLUDE THE PROJECT DETAILS, THE PROJECTED OUTCOME, PAST OUTCOMES, AS WELL AS SUPPORTING INFORMATION INCLUDING PAST AND CURRENT YEARS BUDGET, AUDITED FINANCIAL STATEMENTS (IF APPLICABLE), COPY OF FORM 990, LIST OF THE BOARD OF DIRECTORS, A COPY OF THE ORGANIZATION'S IRS DETERMINATION LETTER AND PHOTOS OF THEIR WORK.

ANY SUBMISSION DEADLINES

LOI'S ARE DUE BETWEEN JUNE 3RD - JULY 20. APPLICATIONS MUST BE SUBMITTED BETWEEN AUGUST 31 - OCT 6.

RESTRICTIONS AND LIMITATIONS ON AWARDS

US AND GLOBAL INITIATIVES IN THE REALMS OF HEALTH, SUSTAINABLE COMMUNITIES (SOCIAL JUSTICE/WELLNESS), AND CLIMATE/ENVIRONMENT, AND OREGON-BASED INITIATIVES IN ART AND EDUCATION.

GENERAL EXPLANATION STATEMENT 12

FORM/LINE IDENTIFIER

FORM 990-PF, PART XV, LINE 2:

EXPLANATION:

DURING 2019, THE GRANT PROCESS WAS AVAILABLE TO PRESELECTED CHARITABLE ORGANIZATIONS ONLY. BEGINNING WITH THE 2020 GRANT CYCLE, UNSOLICITED REQUESTS FOR FUNDS ARE BEING ACCEPTED.