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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0052

2019

Open to Public Inspection

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

Name of foundation
WENDELL FAMILY FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address)
1400 FASHION BLVD NO 1010

City or town, state or province, country, and ZIP or foreign postal code
SAN MATEO, CA 94404

G Check all that apply:

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 3,387,443

J Accounting method:

☒ Cash

☐ Accrual

☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

A Employer identification number
94-3374830

B Telephone number (see instructions)
(650) 854-1000

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here..... ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

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

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

Part I

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

(a)

Revenue and expenses per books

(b)

Net investment income

(c)

Adjusted net income

(d)

Disbursements for charitable purposes (cash basis only)

Revenue

1

Contributions, gifts, grants, etc., received (attach schedule)

822,598

2

Check ☐ if the foundation is **not** required to attach Sch. B

3

Interest on savings and temporary cash investments

4

Dividends and interest from securities

19,910

19,910

5a

Gross rents

b

Net rental income or (loss) _____

6a

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

6,212

b

Gross sales price for all assets on line 6a 1,539,320

7

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

1,539,320

8

Net short-term capital gain

9

Income modifications

10a

Gross sales less returns and allowances _____

b

Less: Cost of goods sold

c

Gross profit or (loss) (attach schedule)

11

Other income (attach schedule)

12

Total. Add lines 1 through 11

848,720

1,559,230

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 (attach schedule)

b

Accounting fees (attach schedule)

2,000

2,000

0

c

Other professional fees (attach schedule)

17

Interest

18

Taxes (attach schedule) (see instructions)

85

85

0

19

Depreciation (attach schedule) and depletion

20

Occupancy

21

Travel, conferences, and meetings

22

Printing and publications

23

Other expenses (attach schedule)

73

73

0

24

Total operating and administrative expenses. Add lines 13 through 23

2,158

2,158

0

25

Contributions, gifts, grants paid

416,018

416,018

26

Total expenses and disbursements. Add lines 24 and 25

418,176

2,158

416,018

27

Subtract line 26 from line 12:

a

Excess of revenue over expenses and disbursements

430,544

b

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

1,557,072

c

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

For Paperwork Reduction Act Notice, see instructions.

Cat. No. 11289X

Form 990-PF (2019)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	280,781	325,018	325,018
	2 Savings and temporary cash investments	1,492,492	883,131	883,131
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ 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 (attach schedule)			
	b Investments—corporate stock (attach schedule)	770,510	0	0
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	0	1,766,178	2,179,294
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,543,783	2,974,327	3,387,443	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> 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	2,543,783	2,974,327	
	29 Total net assets or fund balances (see instructions)	2,543,783	2,974,327	
30 Total liabilities and net assets/fund balances (see instructions) .	2,543,783	2,974,327		

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	2,543,783
2 Enter amount from Part I, line 27a	2	430,544
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	2,974,327
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	2,974,327

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PUBLICLY TRADED SECURITIES	D		
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 1,539,320			1,539,320
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,539,320
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	$\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 7} \\ \text{If (loss), enter -0- in Part I, line 7} \end{array} \right\}$	2	1,539,320
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	$\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 8, column (c) (see instructions).} \\ \text{If (loss), enter -0- in Part I, line 8} \end{array} \right\}$	3	

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	349,495	2,149,376	0.162603
2017	388,210	1,752,999	0.221455
2016	358,202	1,124,643	0.318503
2015	396,172	727,830	0.544319
2014	370,893	648,382	0.572029

2 Total of line 1, column (d)	2	1.818909
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.363782
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	2,633,688
5 Multiply line 4 by line 3	5	958,088
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	15,571
7 Add lines 5 and 6	7	973,659
8 Enter qualifying distributions from Part XII, line 4	8	416,018

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	31,141
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	31,141
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	31,141
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	16,241
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	16,241
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	14,900
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?		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ CA _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation .</i>	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the taxable year beginning in 2019? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>TAXPAYER</u> Telephone no. ▶ <u>(650) 854-1000</u>			

Located at ▶ 1400 FASHION BLVD SUITE 1010 SAN MATEO CAZIP+4 ▶ 94404

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

		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 <input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?	1c	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b	No

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

5a	During the year did the foundation pay or incur any amount to:		Yes	No
(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		5b	
	Organizations relying on a current notice regarding disaster assistance check here. 	<input 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? 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	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.			
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		7b	
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?			
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	<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, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000. 				0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. ►		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	1,822,589
b	Average of monthly cash balances.	1b	851,206
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,673,795
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,673,795
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	40,107
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,633,688
6	Minimum investment return. Enter 5% of line 5.	6	131,684

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	131,684
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	31,141
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	31,141
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	100,543
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	100,543
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	100,543

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	416,018
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	416,018
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	416,018

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				100,543
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019:				
a From 2014. 338,474				
b From 2015. 380,728				
c From 2016. 322,879				
d From 2017. 316,924				
e From 2018. 242,185				
f Total of lines 3a through e.	1,601,190			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 416,018				
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.				100,543
e Remaining amount distributed out of corpus	315,475			
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	1,916,665			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				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 (see instructions). . . .	338,474			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a.	1,578,191			
10 Analysis of line 9:				
a Excess from 2015. 380,728				
b Excess from 2016. 322,879				
c Excess from 2017. 316,924				
d Excess from 2018. 242,185				
e Excess from 2019. 315,475				

Part XIV

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

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

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

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

1 Information Regarding Foundation Managers:

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

PETER WENDELL

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

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

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

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

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

c Any submission deadlines:

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	416,018
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated.

[illegible]

Part XVII

- | | | | |
|--|--|-----|----|
| | | Yes | No |
|--|--|-----|----|

--	--	--

- | | | |
|-------|--|----|
| 1a(1) | | No |
| 1a(2) | | No |

--	--	--

- | | | |
|--------------|--|-----------|
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |

1c		No
----	--	----

value
ue

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations

described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

Print/Type preparer's name GARY D LACHER	Preparer's Signature	Date 2020-05-29	Check if self-employed <input type="checkbox"/>	PTIN P00192831
Firm's name ▶ SACKS PRESS & LACHER PC				Firm's EIN ▶ 13-3050313
Firm's address ▶ 600 THIRD AVENUE NEW YORK, NY 100161901				Phone no. (212) 682-6640

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
PETER WENDELL	PRESIDENT, DIRECTOR, SECY 4.00	0	0	0
1400 FASHION BLVD 1010 SAN MATEO, CA 94404				
LYNN WENDELL	DIRECTOR 2.00	0	0	0
1400 FASHION BLVD 1010 SAN MATEO, CA 94404				
CHRISTOPHER WENDELL	DIRECTOR 0.25	0	0	0
1400 FASHION BLVD 1010 SAN MATEO, CA 94404				
BRIAN WENDELL	DIRECTOR 0.25	0	0	0
1400 FASHION BLVD 1010 SAN MATEO, CA 94404				
JENNIFER LENTZ	DIRECTOR 0.25	0	0	0
1400 FASHION BLVD 1010 SAN MATEO, CA 94404				
EMILY WENDELL	DIRECTOR 0.25	0	0	0
1400 FASHION BLVD 1010 SAN MATEO, CA 94404				
PATRICK WENDELL	DIRECTOR 0.25	0	0	0
1400 FASHION BLVD 1010 SAN MATEO, CA 94404				
CAROLYN A WENDELL	DIRECTOR 0.25	0	0	0
1400 FASHION BLVD 1010 SAN MATEO, CA 94404				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AC RUBGY FOUNDATION 180 CENTER PARK SOUTH NEW YORK, NY 10019		PC	GENERAL PURPOSES	1,500
AIM HIGHP O BOX 410715 SAN FRANCISCO, CA 94141		PC	GENERAL PURPOSES	500
ALL STARS HELPING KIDS 4675 STEVENS CREEK BLVD SUITE 125 SANTA CLARA, CA 95051		PC	GENERAL PURPOSES	500
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN FOUNDATION FOR SUICIDE PREVENTION 555 SATURN BLVD B252 SAN DIEGO, CA 92154		PC	GENERAL PURPOSES	100
AMERICAN INDIA FOUNDATION 530 LYTTON AVENUE PALO ALTO, CA 94301		PC	GENERAL PURPOSES	2,500
AMERICAN INSTITUTE OF CHEMICAL ENGINEERS 3 PARK AVENUE NEW YORK, NY 10016		PC	GENERAL PURPOSES	5,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BARBARA C HARRIS CAMP AND CONFERENCE CENTER P O BOX 204 GREENFIELD, NH 03047		PC	GENERAL PURPOSES	500
BERKELEY UNIVERSITY 1995 UNIVERSITY AVE BERKELEY, CA 947041070		PC	GENERAL PURPOSES	1,000
BEST BUDDIES INTERNATIONAL 100 SE 2ND STREET SUITE 2200 MIAMI, FL 33131		PC	GENERAL PURPOSES	250
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BIRTHRIGHT AFRICA 205 E 42ND STREET NEW YORK, NY 10017		PC	GENERAL PURPOSES	250
BOYS & GIRLS CLUBS OF SAN FRANCISCO 380 FULTON ST SAN FRANCISCO, CA 94102		PC	GENERAL PURPOSES	1,000
CAMINAR 2600 S EL CAMINO REAL SUITE 200 SAN MATEO, CA 94403		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CANCER SUPPORT COMMUNITY GREATER PHILADELPHIA 200 KIRK ROAD WARMINISTER, PA 18974		PC	GENERAL PURPOSES	200
CENTER FOR MINDFUL COMPASSION 10601-G TIERRASANTA BLVD SUITE 205 SAN DIEGO, CA 94124		PC	GENERAL PURPOSES	100
CENTER FOR REPRODUCTIVE RIGHTS 199 WATER STREET NEW YORK, NY 10038		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CHRONICLE SEASON OF SHARING FUND P O BOX 44740 SAN FRANCISCO, CA 94144		PC	GENERAL PURPOSES	25,000
CITY SURF PROJECT 1633 VALENCIA STREET SAN FRANCISCO, CA 94110		PC	GENERAL PURPOSES	824
COACHING CORPS310 8TH STREET OAKLAND, CA 94607		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
COMPASS FAMILY SERVICES 37 GROVE STREET SAN FRANCISCO, CA 94102		PC	GENERAL PURPOSES	500
COTTAGE 1886 FOUNDATION 51 PROSPECT AVENUE PRINCETON, NJ 08540		PC	GENERAL PURPOSES	55,000
CURE ALZHEIMER'S FUND 34 WASHINGTON STREET WELLESLEY, MA 02481		PC	GENERAL PURPOSES	500
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DARTMOUTH COLLEGE 6066 DEVELOPMENT OFFICE HANOVER, NH 037554400		PC	GENERAL PURPOSES	1,000
DISCOVERY LAND COMPANY FOUNDATION 301 N CANON DRIVE SUITE 328 BEVERLY HILLS, CA 90210		PC	GENERAL PURPOSES	1,000
EDUCARE DC640 ANACOSTIA AVENUE WASHINGTON, DC 20019		PC	GENERAL PURPOSES	500
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ENNEAGRAM PRISON PROJECT PO BOX 804 LOS GATOS, CA 95031		PC	GENERAL PURPOSES	250
EPISCOPAL CHURCH AT PRINCETON 53 UNIVERSITY PLACE PRINCETON, NJ 08540		PC	GENERAL PURPOSES	300
EPISCOPAL CHURCH OF ST MARY THE VIRGIN 2325 UNION STREET SAN FRANCISCO, CA 94123		PC	GENERAL PURPOSES	5,700
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
EPISCOPAL DIOCESE OF MASSACHUSETTS 138 TREMONT ST BOSTON, MA 02111		PC	GENERAL PURPOSES	1,000
EQUAL JUSTICE INITIATIVE 122 COMMERCE STREET MONTGOMERY, AL 36104		PC	GENERAL PURPOSES	1,500
FISHERS ISLAND CONSERVANCY PO BOX 553 FISHERS ISLAND, NY 06390		PC	GENERAL PURPOSES	50,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FOUNDATION FOR STUDENT COMMUNICATION 48 UNIVERSITY PLACE PRINCETON, NJ 08540		PC	GENERAL PURPOSES	2,500
GIVEINDIA UNIT 406 4TH FL TOWER A UNITECH WORLD CYBER PARK GURGAON 12201 IN		PC	GENERAL PURPOSES	100
GLAD TIDINGS CHURCH 1800 QUANDRA STREET VICTORIA, BRITISH COLUMBIA V8T 4B9 CA		PC	GENERAL PURPOSES	390
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GOLDEN GATE NATIONAL PARKS CONSERVANCY 201 FORT MASON SAN FRANCISCO, CA 94123		PC	GENERAL PURPOSES	76,500
GOOD SAMARITAN FAMILY RESOURCE CENTER 1294 POTRERO AVENUE SAN FRANCISCO, CA 94110		PC	GENERAL PURPOSES	500
GRACE COVENANT PRESBYTERIAN CHURCH 1627 MONUMENT AVENUE RICHMOND, VA 23220		PC	GENERAL PURPOSES	5,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GRASSROOTS SOCCERP O BOX 712 NORWICH, VT 05055		PC	GENERAL PURPOSES	7,500
HARVARD BUSINESS SCHOOLTEEL HALL BOSTON, MA 02163		PC	GENERAL PURPOSES	25,000
HARVARD COLLEGE FUND PO BOX 419209 BOSTN, MA 02241		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HARVARD MAGAZINE7 WARE STREET CAMBRIDGE, MA 02138		PC	GENERAL PURPOSES	500
INDEPENDENT SCHOOLS CHAIRPERSONS ASSOCIATION 287 GIBBS AVENUE NEWPORT, RI 02840		PC	GENERAL PURPOSES	1,500
INSTITUTE FOR ADVANCED STUDY IAS EINSTEIN DRIVE PRINCETON, NJ 08540		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
INTERFAITH CENTER AT THE PRESIDIO PO BOX 29055 SAN FRANCISCO, CA 94129		PC	GENERAL PURPOSES	100
ISLES INC10 WOOD STREET TRENTON, NJ 08618		PC	GENERAL PURPOSES	10,000
JDRF26 BROADWAY NEW YORK, NY 94118		PC	GENERAL PURPOSES	100
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH COMMUNITY CENTER OF SAN FRANCISCO 3200 CALIFORNIA STREET SAN FRANCISCO, CA 94118		PC	GENERAL PURPOSES	1,000
KIPP BAY AREA PUBLIC SCHOOLS 1000 BROADWAY SUITE 460 OAKLAND, CA 94607		PC	GENERAL PURPOSES	10,000
LITERACY VOLUNTEERS WASHINGTON COUNTY 93 TOWER STREET WESTERLY, RI 02891		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LIZZY RAGAN MEDICAL RECOVERY FUND 43 MADISON STREET SOMERVILLE, MA 02143		PC	GENERAL PURPOSES	4,500
MANOMET INC 125 MANOMET POINT ROAD PLYMOUTH, MA 02360		PC	GENERAL PURPOSES	500
MCGILL UNIVERSITY 475 PINE AVENUE WEST MONTREAL, QUEBEC H2W1S4 CA		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MINDFUL SCHOOLS1260 45TH STREET EMERYVILLE, CA 94608		PC	GENERAL PURPOSES	250
MUSIC MENLO50 VALPARAISO AVENUE ATHERTON, CA 94027		PC	GENERAL PURPOSES	150
NEW YORK WOMEN'S FOUNDATION 39 BROADWAY 23RD FLOOR NEW YORK, NY 10006		PC	GENERAL PURPOSES	500
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
OAKLAND LACROSSE CLUB 1970 BROADWAY SUITE 920 OAKLAND, CA 94612		PC	GENERAL PURPOSES	1,000
ONE PURPOSE SCHOOL 948 HOLLISTER AVENUE SAN FRANCISCO, CA 94124		PC	GENERAL PURPOSES	1,000
OUTWARD BOUND CALIFORNIA 1539 PERSHING DRIVE SAN FRANCISCO, CA 94129		PC	GENERAL PURPOSES	250
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PALO ALTO PLAYERS 1305 MIDDLEFIELD ROAD PALO ALTO, CA 94301		PC	GENERAL PURPOSES	7,500
PAN-MASS CHALLENGE77 4TH AVENUE NEEDHAM, MA 02494		PC	GENERAL PURPOSES	1,727
PEER HEALTH EXCHANGE70 GOLD ST SAN FRANCISCO, CA 94133		PC	GENERAL PURPOSES	2,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PLANNED PARENTHOOD 2185 PACHECO STREET CONCORD, CA 94520		PC	GENERAL PURPOSES	150
PRINCETON BLAIRSTOWN CENTER 13 ROSZEL ROAD PRINCETON, NJ 08540		PC	GENERAL PURPOSES	1,000
PRINCETON IN AFRICA FUND PRINCETON UNIVERSITY PRINCETON, NJ 08544		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PRINCETON PATROLMEN'S BENEVOLENT ASSOCIATION P O BOX 568 PRINCETON, NJ 08540		PC	GENERAL PURPOSES	100
PRINCETON UNIVERSITYP O BOX 5357 PRINCETON, NJ 085435357		PC	GENERAL PURPOSES	3,800
PRINCETON UNIVERSITY FRIENDS OF THEATRE INTIME PO BOX 5357 PRINCETON, NJ 05843		PC	GENERAL PURPOSES	400
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ROSIE'S PLACE889 HARRISON AVENUE BOSTON, MA 02118		PC	GENERAL PURPOSES	1,100
SAN FRANCISCO AIDS FOUNDATION 1035 MARKET STREET SUITE 400 SAN FRANCISCO, CA 94103		PC	GENERAL PURPOSES	100
SAN FRANCISCO BEAUTIFUL 2269 CHESTNUT STREET SUITE 437 SAN FRANCISCO, CA 94123		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SAN FRANCISCO BOYS CHORUS 333 HAYES STREET SUITE 116 SAN FRANCISCO, CA 94102		PC	GENERAL PURPOSES	250
SAN FRANCISCO EDUCATION FUND 2730 BRYANT STREET SAN FRANCISCO, CA 94110		PC	GENERAL PURPOSES	2,045
SAN FRANCISCO UNIVERSITY HIGH SCHOOL 3065 JACKSON STREET SAN FRANCISCO, CA 94115		PC	GENERAL PURPOSES	200
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SCHEUERMAN YOUTH FUND P O BOX 148 STILLWATER, MN 55082		PC	GENERAL PURPOSES	1,000
SELAMTA FAMILY PROJECTPO BOX 1857 LAKE PLACID, FL 33862		PC	GENERAL PURPOSES	1,032
SPIRIT ROCK MEDITATION CENTER PO BOX 169 WOODACRE, CA 94973		PC	GENERAL PURPOSES	250
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ST ANTHONY'SP O BOX 39000 SAN FRANCISCO, CA 041390001		PC	GENERAL PURPOSES	500
ST PAUL'S EPISCOPAL CHURCH 100 PINE HILL ROAD BEDFORD, MA 01730		PC	GENERAL PURPOSES	6,000
ST STEPHEN'S YOUTH PROGRAMS 419 SHAWMUT AVENUE BOSTON, MA 02118		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
STANFORD INSTITUTE FOR ECONOMIC POLICY RESEARCH 366 GALVEZ STREET STANFORD, CA 94305		PC	GENERAL PURPOSES	1,000
TEN STRANDS 330 IGNACIO BLVD SUITE 201 NOVATO, CA 94949		PC	GENERAL PURPOSES	1,000
THE EXPLORATORIUMPIER 17 SAN FRANCISCO, CA 94111		PC	GENERAL PURPOSES	15,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE FACIAL PAIN ASSOCIATION 408 W UNIVERSITY AVE GAINESVILLE, FL 32601		PC	GENERAL PURPOSES	900
THE FOUNDATION OF CITY COLLEGE OF SAN FRANCISCO P O BOX 2879 ALAMEDA, CA 94501		PC	GENERAL PURPOSES	200
THE HAMLIN SCHOOL 2121 BROADWAY STREET SAN FRANCISCO, CA 94115		PC	GENERAL PURPOSES	25,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE MICHAEL J FOX FOUNDATION PO BOX 4777 NEW YORK, NY 10163		PC	GENERAL PURPOSES	1,500
TIGER CAPITAL MANAGEMENT 2 QUAIL RIDGE PRINCETON JUNCTION, NJ 08550		PC	GENERAL PURPOSES	1,000
TOWN SCHOOL FOR BOYS 2750 JACKSON STREET SAN FRANCISCO, CA 94115		PC	GENERAL PURPOSES	8,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TRUSTEES OF PRINCETON UNIVERSITY 100 OVERLOOK CENTER SUITE 300 PRINCETON, NJ 08540		PC	GENERAL PURPOSES	7,500
UC BERKELEY FOUNDATION 1995 UNIVERSITY AVENUE SUITE 400 BERKELEY, CA 94704		PC	GENERAL PURPOSES	100
UNIVERSITY HIGH SCHOOL 3065 JACKSON STREET SAN FRANCISCO, CA 94115		PC	GENERAL PURPOSES	3,500
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF NOTRE DAME MAIN ST NOTRE DAME, IN 46556		PC	GENERAL PURPOSES	500
US LACROSSE 2 LOVETON CIRCLE SPARKS, MD 21152		PC	GENERAL PURPOSES	1,000
UTEC 15 WARREN STREET LOWELL, MA 01852		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WHEELCHAIR FOUNDATION 3820 BLACKHAWK ROAD DANVILLE, CA 94506		PC	GENERAL PURPOSES	600
WIKIMEDIA FOUNDATION 1 MONTGOMERY STREET SUITE 1600 SAN FRANCISCO, CA 94104		PC	GENERAL PURPOSES	500
WILLIAMS COLLEGE ALUMNI FUND 75 PARK STREET WILLIAMSTOWN, MA 01267		PC	GENERAL PURPOSES	250
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WILLIAMS COLLEGE PARENTS FUND 75 PARK STREET WILLIAMSTOWN, MA 012672141		PC	GENERAL PURPOSES	1,000
WILLOW DOMESTIC VIOLENCE CENTER PO BOX 39601 ROCHESTER, NY 14604		PC	GENERAL PURPOSES	250
WINDRIDER INSTITUTE P O BOX 184 MENLO PARK, CA 94026		PC	GENERAL PURPOSES	1,000
Total ▶ 3a				416,018

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
YMCA OF SAN FRANCISCO 50 CALIFORNIA STREET SUITE 650 SAN FRANCISCO, CA 94111		PC	GENERAL PURPOSES	250
YOSEMITE CONSERVANCY 101 MONTGOMERY STREET SAN FRANCISCO, CA 94104		PC	GENERAL PURPOSES	500
Total ▶ 3a				416,018

TY 2019 Accounting Fees Schedule**Name:** WENDELL FAMILY FOUNDATION**EIN:** 94-3374830

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SACKS PRESS & LACHER	2,000	2,000		0

TY 2019 Investments - Other Schedule

Name: WENDELL FAMILY FOUNDATION

EIN: 94-3374830

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
INVESCO QQQ TRUST, SERIES 1	AT COST	882,964	1,117,478
SPDR S&P ETF TRUST	AT COST	883,214	1,061,816

TY 2019 Other Expenses Schedule**Name:** WENDELL FAMILY FOUNDATION**EIN:** 94-3374830**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADMINISTRATIVE	73	73		0

TY 2019 Taxes Schedule**Name:** WENDELL FAMILY FOUNDATION**EIN:** 94-3374830

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CALIFORNIA FILING FEES	85	85		0

Schedule B (Form 990, 990-EZ, or 990-PF) <small>Department of the Treasury Internal Revenue Service</small>	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.	OMB No. 1545-0047 2019
	Name of the organization WENDELL FAMILY FOUNDATION	Employer identification number 94-3374830

Organization type (check one):

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization
WENDELL FAMILY FOUNDATION

Employer identification number
94-3374830

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	SCHMIDT FAMILY LIVING TRUST 555 BRYANT STREET PALO ALTO, CA 94301	\$ 762,598	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
2	SCOTT D COOK 2700 COAST AVE MOUNTAIN VIEW, CA 94043	\$ 60,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
.		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization WENDELL FAMILY FOUNDATION	Employer identification number 94-3374830
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Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	582 SHS ALPHABET INC CL A & CL C	\$ 762,598	2019-11-14
(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 WENDELL FAMILY FOUNDATION	Employer identification number 94-3374830
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Part III

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

Use duplicate copies of Part III if additional space is needed.

(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	