

Form **990-PF**  
 Department of the Treasury  
 Internal Revenue Service

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

OMB No. 1545-0052

**2020**

**Open to Public Inspection**

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**For calendar year 2020, or tax year beginning 01-01-2020 , and ending 12-31-2020**

Name of foundation THE BORCH FOUNDATION		<b>A Employer identification number</b> 20-8777443	
% CHRISTOPHER R BORCH			
Number and street (or P.O. box number if mail is not delivered to street address) 14315 TAOS DRIVE	Room/suite	<b>B Telephone number (see instructions)</b> (408) 395-5585	
City or town, state or province, country, and ZIP or foreign postal code SARATOGA, CA 95070		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here..... <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>	
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here ..... <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>15,268,567</u>		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... <input type="checkbox"/>	
<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

<b>Part I Analysis of Revenue and Expenses</b> <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)	5,839,414			
	<b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B				
	<b>3</b> Interest on savings and temporary cash investments				
	<b>4</b> Dividends and interest from securities	312,377	312,377		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	1,166,619			
	<b>b</b> Gross sales price for all assets on line 6a	2,365,951			
	<b>7</b> Capital gain net income (from Part IV, line 2)		1,166,619		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less: Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)					
<b>12 Total.</b> Add lines 1 through 11	7,318,410	1,478,996			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc.	0			
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits				
	<b>16a</b> Legal fees (attach schedule)				
	<b>b</b> Accounting fees (attach schedule)	5,900	2,950	0	2,950
	<b>c</b> Other professional fees (attach schedule)	10,096	10,096		
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)	9,262	16		
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings				
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (attach schedule)	481	396		85
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	25,739	13,458	0	3,035
<b>25</b> Contributions, gifts, grants paid	164,000			164,000	
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	189,739	13,458	0	167,035	
<b>27</b> Subtract line 26 from line 12:					
<b>a Excess of revenue over expenses and disbursements</b>	7,128,671				
<b>b Net investment income</b> (if negative, enter -0-)		1,465,538			
<b>c Adjusted net income</b> (if negative, enter -0-)					

**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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .			
	<b>2</b> Savings and temporary cash investments . . . . .	166,538	731,272	731,272
	<b>3</b> Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	1,428,038	2,545,399	14,537,295
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .			
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .			
	<b>14</b> Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)				
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,594,576	3,276,671	15,268,567	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .			
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .			
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund			
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds	1,594,576	3,276,671	
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	1,594,576	3,276,671		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) .	1,594,576	3,276,671		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	1,594,576
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	7,128,671
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	8,723,247
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	5,446,576
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	<b>6</b>	3,276,671

**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.)
<b>1 a PUBLICLY TRADED SECURITIES</b>		2001-01-01	2020-12-01
<b>b LONG TERM CAPITAL GAIN DISTRIBUTION</b>		2000-01-01	2020-12-31
<b>c</b>			
<b>d</b>			
<b>e</b>			

(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)
<b>a</b> 2,357,518		1,199,332	1,158,186
<b>b</b> 8,433			8,433
<b>c</b>			
<b>d</b>			
<b>e</b>			

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	
<b>a</b>			1,158,186
<b>b</b>			8,433
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> 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	}	<b>2</b>	1,166,619
<b>3</b> 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	{		}	<b>3</b>	

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

**SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE**

<b>1</b> Reserved			
(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
<b>2</b> Reserved . . . . .			<b>2</b>
<b>3</b> Reserved . . . . .			<b>3</b>
<b>4</b> Reserved . . . . .			<b>4</b>
<b>5</b> Reserved . . . . .			<b>5</b>
<b>6</b> Reserved . . . . .			<b>6</b>
<b>7</b> Reserved . . . . .			<b>7</b>
<b>8</b> Reserved . . . . .			<b>8</b>

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

Table with 11 rows for excise tax calculation. Includes fields for exempt foundations, tax under section 511, tax based on investment income, and credits/payments. Total tax due is 27,629.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, Yes, and No. Questions cover political activities, tax on political expenditures, and asset requirements.

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.
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
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A
14 The books are in care of CHRISTOPHER R BORCH Telephone no. (408) 395-5585
Located at 14315 TAOS DRIVE SARATOGA CA ZIP+4 950705567
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 -check here and enter the amount of tax-exempt interest received or accrued during the year. 15
16 At any time during calendar year 2020, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country SN

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

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

1a During the year did the foundation (either directly or indirectly):
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(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)?
(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.)
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance check here.
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 2020?
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 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? 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.)
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?
b If "Yes," did it have excess business holdings in 2020 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 2020.)
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
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 2020?



**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
<b>Total</b> number of others receiving over \$50,000 for professional services. . . . . ▶		

**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
<b>1</b> . . . . .	
<b>2</b> . . . . .	
<b>3</b> . . . . .	
<b>4</b> . . . . .	

**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
<b>1</b> . . . . .	
<b>2</b> . . . . .	
All other program-related investments. See instructions.	
<b>Total.</b> Add lines 1 through 3 . . . . . ▶	

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	6,968,385
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	314,888
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	7,283,273
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	7,283,273
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	109,249
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	7,174,024
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	358,701

**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.)

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	358,701
<b>2a</b>	Tax on investment income for 2020 from Part VI, line 5. . . . .	<b>2a</b>	20,371
<b>b</b>	Income tax for 2020. (This does not include the tax from Part VI.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	20,371
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	338,330
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	338,330
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . . .	<b>7</b>	338,330

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26. . . . .	<b>1a</b>	167,035
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	0
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	0
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	0
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	167,035
<b>5</b>	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. . . . .	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	167,035

**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 2019	(c) 2019	(d) 2020
<b>1</b> Distributable amount for 2020 from Part XI, line 7				338,330
<b>2</b> Undistributed income, if any, as of the end of 2020:				
<b>a</b> Enter amount for 2019 only. . . . .			0	
<b>b</b> Total for prior years: 2018, 2017, 2016		0		
<b>3</b> Excess distributions carryover, if any, to 2020:				
<b>a</b> From 2015. . . . .	319,276			
<b>b</b> From 2016. . . . .	545,429			
<b>c</b> From 2017. . . . .	678,762			
<b>d</b> From 2018. . . . .	551,030			
<b>e</b> From 2019. . . . .	327,442			
<b>f</b> Total of lines 3a through e. . . . .	2,421,939			
<b>4</b> Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ <u>167,035</u>				
<b>a</b> Applied to 2019, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .				
<b>d</b> Applied to 2020 distributable amount. . . . .				167,035
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	171,295			171,295
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,250,644			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		0		
<b>c</b> 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. . . . .				
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020 . . . . .				0
<b>7</b> 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). . . . .				
<b>8</b> Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions). . . . .	147,981			
<b>9</b> Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a . . . . .	2,102,663			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2016. . . . .	545,429			
<b>b</b> Excess from 2017. . . . .	678,762			
<b>c</b> Excess from 2018. . . . .	551,030			
<b>d</b> Excess from 2019. . . . .	327,442			
<b>e</b> Excess from 2020. . . . .				

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

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2020, enter the date of the ruling. . . . . ▶

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

	Tax year	Prior 3 years			<b>(e) Total</b>
	<b>(a) 2020</b>	<b>(b) 2019</b>	<b>(c) 2018</b>	<b>(d) 2017</b>	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .					
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test—enter:					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					
<b>c</b> "Support" alternative test—enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> 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).)  
CHRISTOPHER R ANDREA W BORCH
- 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 e-mail address of the person to whom applications should be addressed:  
CHRISTOPHER R ANDREA W BORCH  
14315 TAOS DRIVE  
SARATOGA, CA 95070  
(408) 395-5585

**b** The form in which applications should be submitted and information and materials they should include:  
NO SPECIFIC FORM

**c** Any submission deadlines:  
NO DEADLINE

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

**Part XV** Supplementary Information (continued)**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)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total . . . . .</b> ▶ <b>3a</b>				164,000
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b> ▶ <b>3b</b>				





**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)				
<b>a</b> <i>Paid during the year</i>				
BOYS & GIRLS CLUB OF SILICON VALLEY 518 VALLEY WAY MILPITAS, CA 95035	NONE	PC	UNRESTRICTED	1,000
CHESTNUT HILL BENEVOLENT ASSOCIATION 910 Boylston Street Chestnut Hill, MA 02467	NONE	PC	UNRESTRICTED	1,000
GREENVILLE ELITE TRACK CLUB 111 Gascony Drive Greenville, SC 29609	NONE	PC	UNRESTRICTED	5,000
<b>Total . . . . .</b>	<b>▶ 3a</b>			164,000

**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)				
<b>a</b> <i>Paid during the year</i>				
HABITAT FOR HUMANITY 645 HARRISON STREET SUITE 201 SAN FRANCISCO, CA 94107	NONE	PC	UNRESTRICTED	2,500
Humane Society Silicon Valley 901 Ames Avenue Milpitas, CA 95035	NONE	PC	UNRESTRICTED	5,000
TOYS FOR TOTS 901 E MISSION STREET SAN JOSE, CA 95112	NONE	PC	UNRESTRICTED	3,000
<b>Total . . . . . ▶ 3a</b>				164,000

**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)				
<b>a</b> <i>Paid during the year</i>				
Salvation Army 832 Folsom Street San Francisco, CA 94107	NONE	PC	UNRESTRICTED	2,500
SAN JOSE ANIMAL CARE CENTER 200 E SANTA CLARA STREET SAN JOSE, CA 95113	NONE	PC	UNRESTRICTED	1,000
Second Harvest food bank 750 Curtner Avenue San Jose, CA 95125	NONE	PC	UNRESTRICTED	3,000
<b>Total . . . . . ▶ 3a</b>				164,000

**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)				
<b>a</b> <i>Paid during the year</i>				
THE MARINE MAMMAL CENTER 2000 BUNKER ROAD SAUSALITO, CA 94965	NONE	PC	UNRESTRICTED	5,000
UNIVERSITY OF SOUTHERN CALIFORNIA UNIVERSITY PARK CAMPUS LOS ANGELES, CA 90089	NONE	PC	UNRESTRICTED	125,000
USA TRACK & FIELD FOUNDATION 217 LINCOLN AVE SALEM, OH 44460	NONE	PC	UNRESTRICTED	2,500
<b>Total . . . . .</b> ▶ <b>3a</b>				164,000

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)				
<b>a</b> <i>Paid during the year</i>				
YMCA OF SILICON VALLEY 80 Saratoga Avenue SANTA CLARA, CA 95051	NONE	PC	UNRESTRICTED	7,500
<b>Total</b> . . . . .			<b>▶ 3a</b>	164,000

**TY 2020 Accounting Fees Schedule****Name:** THE BORCH FOUNDATION**EIN:** 20-8777443

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ACCOUNTING FEE	5,900	2,950		2,950

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

## **TY 2020 Depreciation Schedule**

**Name:** THE BORCH FOUNDATION

**EIN:** 20-8777443

**TY 2020 Investments Corporate Stock Schedule****Name:** THE BORCH FOUNDATION**EIN:** 20-8777443**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
99 SH FIRST TR EXCHANGE TRADED	10,400	14,017
57 SH ABBOTT LABORATORIES	5,893	6,240
84 SH ABBVIE INC COM	7,702	9,000
32 SH ACCENTURE PLCIRELAND CL	7,488	8,358
198 SH ADOBE INC	17,723	99,024
177 SH AIRBNB INC CL A	24,869	25,983
48 SH ALNYLAM PHARMACEUTICALS	6,302	6,239
53 SH ALPHABET INC CL A	22,679	92,890
56 SH ALPHABET INC CL C	27,078	98,105
101 SH AMERICAN EXPRESS CO	10,362	12,212
2,360 SH APPLE INC	47,713	313,148
59 SH AUTODESK INC DELAWARE	14,044	18,015
96 SH AUTOMATIC DATA PROCESSIN	13,220	16,915
46 SH BROADCOM INC	15,399	20,141
207 SH C3 AI INC CL A	24,846	28,721
38 SH CADENCE DESIGN SYSTEM	4,128	5,184
34 SH CARVANA COCL A	7,882	8,144
539 SH CHARLES SCHWAB NEW	17,327	28,589
254 SH CISCOSYS INC	11,018	11,367
282 SH CLOUDERA INC	3,282	3,923
53 SH COGNIZANT TECH SOLUTIONS	3,542	4,343
585 SH COLGATE PALMOLIVE CO	33,793	50,023
360 SH CONOCOPHILLIPS	14,828	14,396
39 SH COSTCOWHOLESAL CORP NEW	13,465	14,694
22 SH DANAHER CORPORATION	4,442	4,887
122 SH DATADOG INC CL A	10,294	12,010
25 SH DEXCOM INC	10,732	9,243
20 SH DOCUSIGN INC	3,998	4,446
15 SH DOMINOS PIZZA INC	5,912	5,752
142 SH DOORDASH INC CL A	24,946	20,271

## Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
147 SH DRAFTKINGS INC CL A	6,000	6,844
116 SH FACEBOOK INC CL-A	31,962	31,687
131 SH FASTLY INC CL A	10,822	11,445
123 SH FREEPORT-MCMORAN CL-B	2,997	3,200
383 SH GENERAL MILLS INC	16,149	22,520
284 SH HOME DEPOT INC	23,678	75,436
25 SH IAC INTERACTIVECORP NEW	3,275	4,734
165 SH ILL TOOL WORKS INC	11,659	33,640
191 SH JD COM INC SPON ADR CL	13,955	16,789
210 SH JOHNSON & JOHNSON	16,300	33,050
196 SH JPMORGAN CHASE & CO	19,439	24,906
61 SH LOCKHEED MARTIN CORP	13,707	21,654
43 SH LULULEMON ATHLETICA INC	14,713	14,965
171 SH LYFT INC CL A	5,065	8,401
48 SH MARRIOTT INTL INC NEWCL	4,699	6,332
30 SH MASTERCARD INC CL A	10,212	10,708
59 SH MATCH GROUP INC	6,657	8,920
38 SH MERCADOLIBRE INC	42,973	63,658
349 SH MERCK & CO INC NEWCOM	13,016	28,548
262 SH MICROSOFT CORP	55,145	58,274
68 SH MODERNA INC	4,615	7,104
20 SH NETFLIX INC	9,918	10,815
87 SH NEWMONT CORPORATION	5,826	5,210
868 SH NEXTERA ENERGYINC	12,810	66,966
634 SH NIKE INC B	16,157	89,692
72 SH NOVAVAX INC	7,407	8,029
39 SH NVIDIA CORPORATION	19,076	20,366
59 SH NXP SEMICONDUCTORS NV	7,313	9,382
101 SH ORACLE CORP	5,684	6,534
86 SH OTIS WORLDWIDE CORP	4,041	5,809

## Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
566 SH PALANTIR TECHNOLOGIES I	12,929	13,329
210 SH PELOTON INTERACTIVE INC	17,738	31,861
249 SH PEPSICO INC NC	19,198	36,927
662 SH PHILLIPS 66 COM	29,736	46,300
34 SH PINTEREST INC CL A	2,194	2,241
461 SH QUALCOMM INC	32,905	70,229
55 SH ROKU INC COM CL A	8,255	18,261
54 SH SALESFORCE.COM,INC	13,105	12,017
41 SH SELECTQUOTE INC	784	851
44 SH SERVICENOW INC	19,718	24,219
25 SH SHERWIN WILLIAMS COMPANY	17,026	18,373
23 SH SHOPIFY INC	22,370	26,035
45 SH SPOTIFYTECHNOLOGY SA	11,217	14,160
91 SH SQUARE INC CLASS A	13,189	19,805
72 SH STAMPS.COM INC COM NEW	18,602	14,126
606 SH STARBUCKS CORP WASHINGT	11,751	64,830
325 SH TAIWAN SMCNDCR MFGCOLT	26,288	35,438
370 SH TARGET CORPORATION	20,947	65,316
290 SH TENCENT HLDGS LTD UNSPO	20,307	20,848
25 SH TRADE DESK INC CLASS A	11,176	20,025
90 SH TWILIO INC CL A	22,041	30,465
131 SH TWITTER INC	5,260	7,094
171 SH UBER TECHNOLOGIES INC	5,763	8,721
143 SH UNITED PARCEL SER INC	13,762	24,081
56 SH UNITEDHEALTH GP INC	17,499	19,638
246 SH VIRGIN GALACTIC HOLDING	4,292	5,838
35 SH VISA INC CL A	7,071	7,656
4 SH VMWARE INC CLASS A	576	561
193 SH WALMART INC	15,577	27,821
162 SH WALT DISNEYCOHLDGCO	21,086	29,351

## Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
18 SH WIXCOM LTD	5,027	4,499
32 SH ZOOM VIDEOCOMMUNICATIONS	11,477	10,794
165 SH ZOOMINFOTECHNOLOGIES	5,936	7,958
63 SH ZSCALER, INC	8,303	12,582
91 SH FIRST TR EXCHANGE TRADED	4,078	4,502
36 SH FIRST TRUST DJ INTERNET	6,784	7,640
118 SH FIRST TRUST INDS/PRODS	4,875	5,921
81 SH FIRST TRUST NASD 100 IND	6,992	8,170
63 SH FIRST TRUST US EQUITYOPP	5,898	7,454
212 SH INVESCODYNAMIC SEMICOND	16,609	22,245
13 SH INVESCOQQQ TRUST, SERIES	3,660	4,079
189 SH INVESCOS&P 500 QUALITYE	7,278	7,959
13 SH ISHARES CORE HIGH DIVIDE	1,094	1,140
112 SH ISHARES EDGE MSCI MIN V	7,668	8,222
76 SH ISHARES EDGE MSCI MIN VO	4,886	5,159
44 SH ISHARES EDGE MSCI US QLT	4,623	5,113
6 SH ISHARES MORNINGSTAR LRG C	1,146	1,301
207 SH ISHARES MSCI EAFE ETF	14,869	15,103
166 SH ISHARES MSCI EMERGINGMK	7,372	8,577
90 SH ISHARES MSCI USA ESGSELC	6,690	7,411
57 SH ISHARES RUSSELL TOP 200	6,928	7,583
579 SH KRANESHARES CSI CHINA I	40,497	44,461
48 SH PROSHARES TR S&P 500 DV	3,491	3,834
150 SH REAL ESTATE SELECT SECT	5,426	5,484
72 SH SPDR GOLD TR GOLD SHS	13,241	12,842
24 SH SPDR S&P 500 ETF TRUST	8,160	8,973
122 SH SPDR S&P OIL & GAS EXP	6,185	7,137
313 SH VANECK VECTORS GOLD MIN	13,152	11,274
70 SH VANECK VECTORS JUNIOR GO	4,209	3,797
209 SH VANECK VECTORS PHARMACE	13,296	13,892

## Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
236 SH VANGUARD FINANCIALS ETF	14,286	17,193
279 SH VANGUARD FTSE EMERGINGM	12,398	13,981
25 SH VANGUARD INFOTECH ETF	7,854	8,845
124 SH VANGUARD TOTAL INTL STO	6,562	7,460
760 SH ALGER SMALL CAP FOCUS	20,556	25,051
1,055 SH ALGER WEATHERBIE SPZD	19,174	23,755
760 SH ALLIANZGI CONVERTIBLE	28,309	32,390
1,830 SH AMER CENT EMERG MKTS	23,492	27,811
1,698 SH BNY MELLON INTL STK	38,307	41,528
967 SH BNY MELLON NATURAL RES	26,668	30,995
518 SH BNY MELLON SM/MD CAP GW	18,743	20,155
271 SH BNY MELLON WORLDWIDE GW	16,570	17,617
938 SH DELAWARE SMALL CAP GROW	17,427	16,645
501 SH DELAWARE SMID CAP G FUN	29,895	32,368
2,713 SH HARTFORD SCHRODERS	26,598	26,753
161 SH JPMORGAN UNDISC MNGR BEH	7,653	10,297
245 SH MS INSIGHT I	20,075	22,478
183 SH MSIF GROWTH I	14,866	16,694
641 SH POLEN GROWTH INSTITUTIO	26,781	29,412
2,688 SH VOYA STRAT INC OPP FD	26,564	27,124
5,592,600 SH MICRO-MECHANICS	609,832	11,415,322

**TY 2020 Other Decreases Schedule****Name:** THE BORCH FOUNDATION**EIN:** 20-8777443

Description	Amount
IN-KIND STOCK DONATION - DIFFERENCE	5,442,056
LOSS FROM CURRENCY TRANSLATION	4,520

**TY 2020 Other Expenses Schedule****Name:** THE BORCH FOUNDATION**EIN:** 20-8777443**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEE	396	396		
STATE FILING FEE	75			75
FTB FEE	10			10

**TY 2020 Other Professional Fees Schedule****Name:** THE BORCH FOUNDATION**EIN:** 20-8777443

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
INVESTMENT FEES	10,096	10,096		

**TY 2020 Taxes Schedule****Name:** THE BORCH FOUNDATION**EIN:** 20-8777443**Taxes Schedule**

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
EXCISE TAX	9,246			
FOREIGN TAX PAID	16	16		

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

**Schedule of Contributors**  
▶ Attach to Form 990, 990-EZ, or 990-PF.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047  
**2020**

Name of the organization  
THE BORCH FOUNDATION

**Employer identification number**  
20-8777443

**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 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 33<sup>1</sup>/<sub>3</sub>% 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  
THE BORCH FOUNDATION

Employer identification number  
20-8777443

**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	SARCADIA LLC 14315 TAOS DRIVE  SARATOGA, CA 95070	\$ 50,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
2	CHRISTOPHER R ANDREA W BORCH 14315 TAOS DRIVE  SARATOGA, CA 95070	\$ 5,789,414	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input checked="" 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.)
		\$	<input 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.)
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization THE BORCH FOUNDATION	Employer identification number 20-877443
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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
2	(see instructions). Use duplicate copies of Part II if additional space is needed. 2,850,000 SH MICRO-MECHANICS	\$ 5,789,414	2020-12-18
-	_____ _____ _____	\$ _____	_____
-	_____ _____ _____	\$ _____	_____
-	_____ _____ _____	\$ _____	_____
-	_____ _____ _____	\$ _____	_____
-	_____ _____ _____	\$ _____	_____

Name of organization  
THE BORCH FOUNDATION

Employer identification number  
20-8777443

**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	
_____ _____		_____ _____	