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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

2020

Open to Public Inspection

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

Name of foundation
Ralph & Marsha Guggenheim Family Foundation

Number and street (or P.O. box number if mail is not delivered to street address)
141 Alton Avenue

City or town, state or province, country, and ZIP or foreign postal code
San Francisco, CA 94116

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)
\$ 598,288

J Accounting method:
☐ Cash
☐ Accrual
☒ Other (specify) Modified Cash
(Part I, column (d) must be on cash basis.)

A Employer identification number
26-3873872

B Telephone number (see instructions)
(415) 759-0331

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)	119,455		
	2 Check ☐ if the foundation is not required to attach Sch. B			
	3 Interest on savings and temporary cash investments	13	13	
	4 Dividends and interest from securities	3,230	3,230	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	66,929		
	b Gross sales price for all assets on line 6a	246,037		
	7 Capital gain net income (from Part IV, line 2)		246,011	
	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	189,627	249,254		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.			
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	2,590		2,590
	c Other professional fees (attach schedule)			
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	1,858		
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
	22 Printing and publications			
	23 Other expenses (attach schedule)	261	176	85
	24 Total operating and administrative expenses. Add lines 13 through 23	4,709	176	2,675
	25 Contributions, gifts, grants paid	252,858		252,858
26 Total expenses and disbursements. Add lines 24 and 25	257,567	176	255,533	
	27 Subtract line 26 from line 12:			
	a Excess of revenue over expenses and disbursements	-67,940		
	b Net investment income (if negative, enter -0-)		249,078	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat. No. 11289X

Form 990-PF (2020)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	76,906	116,349	116,349
	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	7,723		
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	530,792	481,939	481,939
	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)			
	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)	615,421	598,288	598,288	
Liabilities	17 Accounts payable and accrued expenses		39,912	
	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)		39,912	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	615,421		
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 Total net assets or fund balances (see instructions)	615,421	558,376	
30 Total liabilities and net assets/fund balances (see instructions) .	615,421	598,288		

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	615,421
2 Enter amount from Part I, line 27a	2	-67,940
3 Other increases not included in line 2 (itemize) ▶ _____	3	10,895
4 Add lines 1, 2, and 3	4	558,376
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	558,376

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	246,011
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		3	

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

1 Reserved		
(a) Reserved	(b) Reserved	(c) Reserved
2 Reserved		2
3 Reserved.		3
4 Reserved		4
5 Reserved		5
6 Reserved		6
7 Reserved		7
8 Reserved ,		8

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
b	Reserved.	1	3,462
c	All other domestic foundations enter 1.39% 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	
3	Add lines 1 and 2.	3	3,462
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.	5	3,462
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	4,000
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	4,000
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached.	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed .	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .	10	538
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax 538 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	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>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ _____ (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>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► CA _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>Ralph Guggenheim</u> Telephone no. ▶ <u>(415) 759-0331</u>			

Located at ▶ 141 Alton Avenue San Francisco CAZIP+4 ▶ 94116

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 ▶	16	Yes	No

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b	No
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?	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 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 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.)	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 2020?	4b	No

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation. See instructions**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Marsha M Guggenheim 141 Alton Avenue San Francisco, CA 94116	President 1.00	0		
Ralph J Guggenheim 141 Alton Avenue San Francisco, CA 94116	Secretary/Treas 1.00	0		

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.

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. ►		

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 ►	

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	432,848
b	Average of monthly cash balances.	1b	58,236
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	491,084
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	
3	Subtract line 2 from line 1d.	3	491,084
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	7,366
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	483,718
6	Minimum investment return. Enter 5% of line 5.	6	24,186

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	24,186
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	3,462
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	3,462
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	20,724
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	20,724
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	20,724

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	255,533
b	Program-related investments—total from Part IX-B.	1b	
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	255,533
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	255,533

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
1 Distributable amount for 2020 from Part XI, line 7				20,724
2 Undistributed income, if any, as of the end of the 2020:				
a Enter amount for 2019 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	100,914			
b From 2016.	120,303			
c From 2017.	134,305			
d From 2018.	147,597			
e From 2019.	144,866			
f Total of lines 3a through e.	647,985			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ 255,533				
a Applied to 2019, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2020 distributable amount.				20,724
e Remaining amount distributed out of corpus	234,809			
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	882,794			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
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.				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2021. 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).				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions).	100,914			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a.	781,880			
10 Analysis of line 9:				
a Excess from 2016.	120,303			
b Excess from 2017.	134,305			
c Excess from 2018.	147,597			
d Excess from 2019.	144,866			
e Excess from 2020.	234,809			

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)

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

	Tax year	Prior 3 years			(e) Total
	(a) 2020	(b) 2019	(c) 2018	(d) 2017	
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).) See Additional Data Table

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	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> See Additional Data Table				
Total			▶ 3a	252,858
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated.

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

Form **990-PF** (2020)

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
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1a(1)		No
1a(2)		No

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1b(1)	No
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1b(2)		No
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1b(3)	No
--------------	-----------

1b(4)	No
--------------	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

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

value
ue

[illegible]

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

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

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

**Sign
Here**

2021-04-14

Signature of officer or trustee

Date _____

Title

May the IRS discuss this
return
with the preparer shown
below

(see instr.) ☐ Yes ☒ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Michael Fontanello

Preparer's Signature

Date _____

Check if self-employed ► ☐

PTIN

P01471027

Firm's name ► Fontanello Duffield & Otake LLP

Firm's EIN ► 37-1420474

Firm's address ► 44 Montgomery Street Suite 1305

Phone no. (415) 983-0200

San Francisco, CA 94104

Form 990PF Part XV Line 1a - 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).

Marsha M Guggenheim
Ralph J Guggenheim

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>				
ACLU125 Broad Street 18th Floor New York, NY 10004	N/A	PC	General Support	1,000
Amer Friends of Magen David Adom 5535 Balboa Blvd 114 Encino, CA 91316	N/A	PC	General Support	1,378
Anti-Defamation League 605 Third Avenue New York, NY 10158	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Asian Art Museum Foundation 200 Larkin Street San Francisco, CA 94102	N/A	PC	General Support	500
Bay Area Jewish Healing Center 3330 Geary Blvd 925 San Francisco, CA 94118	N/A	PC	General Support	720
Boys and Girls Club of San Francisc 55 Hawthorne Street 600 San Francisco, CA 94105	N/A	PC	General Support	750
Total ▶ 3a				252,858

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>				
Breast Cancer Fund 1388 Sutter Street 400 San Francisco, CA 94109	N/A	PC	General Support	720
California State Parks Association 50 Francisco Street 110 San Francisco, CA 94133	N/A	PC	General Support	500
Congregation M'kor Hayim PO Box 31806 Tucson, AZ 85751	N/A	PC	General Support	360
Total ▶ 3a				252,858

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>				
CPMC ResearchPO Box 7999 San Francisco, CA 94120	N/A	PC	General Support	1,000
Fine Arts Museums of SF 50 Hagiwara Tea Garden Drive San Francisco, CA 94118	N/A	PC	General Support	3,000
Jewish Family and Children's Servic 2150 Post Street San Francisco, CA 94115	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
La Casa De Las Madres 1663 Mission Street 225 San Francisco, CA 94103	N/A	PC	General Support	500
Mill Valley Film Festival1118 4th Street San Rafael, CA 94901	N/A	PC	General Support	130
San Francisco Food Bank 900 Pennsylvania Avenue San Francisco, CA 94107	N/A	PC	General Support	5,000
Total ▶ 3a				252,858

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 Nature Education 3450 Geary Blvd 208 San Francisco, CA 94118	N/A	PC	General Support	100
SF Museum Of Modern Art 151 Third Street San Francisco, CA 94103	N/A	PC	General Support	5,000
San Francisco Jazz Organization 3 Embarcadero Ctr Lobby San Francisco, CA 94111	N/A	PC	General Support	5,000
Total ▶ 3a				252,858

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>				
Shalom BayitPO Box 10102 Oakland, CA 94610	N/A	PC	General Support	540
Sierra Club85 Second Street 2nd Floor San Francisco, CA 94105	N/A	PC	General Support	375
St Mary's Interfaith Stockton 545 W Sonora Avenue Stockton, CA 95203	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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 Nature Conservancy 4245 N Fairfax Drive 100 Arlington, VA 22203	N/A	PC	General Support	500
Truckee Tahoe Community Foundation 11071 Donner Pass Rd Truckee, CA 96160	N/A	PC	General Support	2,000
Upstart Bay Area332 Pine Street 600 San Francisco, CA 94104	N/A	PC	General Support	2,000
Total ▶ 3a				252,858

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 Jewish Committee 165 East 56th Street New York, NY 10022	N/A	PC	General Support	500
American Jewish World Service Inc 45 W 36th St New York, NY 10018	N/A	PC	General Support	500
Beyond Differences 336 Bon Air Center 436 Greenbrae, CA 94904	N/A	PC	General Support	500
Total ▶ 3a				252,858

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>				
CA Academy of Sciences 55 Music Concourse Drive San Francisco, CA 94118	N/A	PC	General Support	269
Carnegie Mellon University 5000 Forbes Ave Pittsburgh, PA 15213	N/A	PC	General Support	27,000
Chabad at Emory1526 N Decatur Rd Atlanta, GA 30307	N/A	PC	General Support	180
Total ▶ 3a				252,858

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>				
Contemporary Jewish Museum 736 Mission St San Francisco, CA 94103	N/A	PC	General Support	5,400
Emory University1762 Clifton Road 1400 Atlanta, GA 30322	N/A	PC	General Support	500
Exploratorium3601 Lyon St San Francisco, CA 94123	N/A	PC	General Support	150
Total ▶ 3a				252,858

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>				
First Graduate Inspire a First 37 Graham 100 San Francisco, CA 94129	N/A	PC	General Support	500
Glide Foundation330 Ellis St San Francisco, CA 94102	N/A	PC	General Support	500
Hebrew Free Loan Assn 131 Steuart St 425 San Francisco, CA 94105	N/A	PC	General Support	2,000
Total ▶ 3a				252,858

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>				
Homeless Prenatal Program 2500 18th Street San Francisco, CA 94110	N/A	PC	General Support	1,000
Jewish Community Center San Francis 3200 California St San Francisco, CA 94118	N/A	PC	General Support	3,600
Jewish Community Federation of SF 121 Steuart St San Francisco, CA 94105	N/A	PC	General Support	1,360
Total ▶ 3a				252,858

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 National Fund42 East 69th Street New York, NY 10021	N/A	PC	General Support	360
Jewish Vocational Services 225 Bush St 400 San Francisco, CA 94104	N/A	PC	General Support	1,500
KQED2601 Mariposa St San Francisco, CA 94110	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Larkin Street Youth Services 1138 Sutter St San Francisco, CA 94109	N/A	PC	General Support	2,000
Lehrhaus Judaica2736 Bancroft Way Berkeley, CA 94704	N/A	PC	General Support	1,800
Meals on Wheels SF1375 Fairfax Ave San Francisco, CA 94124	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Music In Schools Today 582 Market St 213 San Francisco, CA 94104	N/A	PC	General Support	360
San Francisco Village3330 Geary Blvd San Francisco, CA 94118	N/A	PC	General Support	500
San Francisco SPCA2500 16th St San Francisco, CA 94103	N/A	PC	General Support	250
Total ▶ 3a				252,858

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>				
SF State Univeristy1600 Holloway Ave San Francisco, CA 94132	N/A	PC	General Support	500
Tahoe Rim Trail948 Incline Way Incline Village, NV 89451	N/A	PC	General Support	500
Arthritis Foundation Atlanta 3119 Shallowford Road Atlanta, GA 30341	N/A	PC	General Support	360
Total ▶ 3a				252,858

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>				
SF Bay Bird Observatory524 Valley Way Milpitas, CA 95035	N/A	PC	General Support	300
Temple Israel Stockton 5105 North El Dorado Street Stockton, CA 95207	N/A	PC	General Support	360
American Joint Distribution Committ 711 Third Ave New York, NY 10017	N/A	PC	General Support	500
Total ▶ 3a				252,858

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 General Hospital 2789 25th St 2028 San Francisco, CA 94110	N/A	PC	General Support	1,000
UC Berkeley Foundation 2080 Addison St 4200 Berkeley, CA 94720	N/A	PC	General Support	500
Union Of Concerned Scientists 2 Brattle Square Cambridge, MA 02138	N/A	PC	General Support	250
Total ▶ 3a				252,858

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>				
FJCUri L'Tzedek25 Broadway 17th Fl New York, NY 10004	N/A	PC	General Support	360
Kehila San Francisco220 Marcos St San Francisco, CA 94116	N/A	PC	General Support	360
San Francisco Film Society 39 Mesa Street Suite 110 San Francisco, CA 94129	N/A	PC	General Support	100
Total ▶ 3a				252,858

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 Parks Alliance 451 Hayes St San Francisco, CA 94102	N/A	PC	General Support	1,000
Urban Adamah1050 Parker St Berkeley, CA 94710	N/A	PC	General Support	360
Congregation Emanu El2 Lake St San Francisco, CA 94118	N/A	PC	General Support	76,216
Total ▶ 3a				252,858

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 J weekly225 Bush Street San Francisco, CA 94104	N/A	PC	General Support	500
San Francisco Symphony 201 Van Ness Avenue San Francisco, CA 94102	N/A	PC	General Support	1,000
Stanford University328 Lomita Drive Stanford, CA 94305	N/A	PC	General Support	100
Total ▶ 3a				252,858

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>				
Farallones Marine Sanctuary Assn POB 29386 San Francisco, CA 94129	N/A	PC	General Support	250
Beth El Synagogue1301 Oxford St Berkeley, CA 94709	N/A	PC	General Support	180
Brandeis School of San Francisco 655 Brotherhood Way San Francisco, CA 94132	N/A	PC	General Support	2,000
Total ▶ 3a				252,858

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>				
College Track111 Broadway Suite 101 Oakland, CA 94607	N/A	PC	General Support	500
Jewish Film Fesitval145 9th St 200 San Francisco, CA 94103	N/A	PC	General Support	5,000
For-site Foundation 2 Marina Blvd Building C San Francisco, CA 94123	N/A	PC	General Support	500
Total ▶ 3a				252,858

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>				
Hair To Stay2234 Beach St San Francisco, CA 94123	N/A	PC	General Support	10,040
Planned Parenthood of No CA 1650 Valencia Street San Francisco, CA 94110	N/A	PC	General Support	2,000
SF Zoological Society1 Zoo Road San Francisco, CA 94132	N/A	PC	General Support	500
Total ▶ 3a				252,858

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 Jude262 Danny Thomas Place Memphis, TN 38105	N/A	PC	General Support	250
Giffords Law Ctr to Prevent Gun Vio 268 Bush Street 555 San Francisco, CA 94104	N/A	PC	General Support	250
HIAS411 Fifth Avenue Suite 1006 New York, NY 10016	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Kidzone Museum 11711 Donner Pass Road Truckee, CA 96161	N/A	PC	General Support	300
San Francisco Conservatory of Music 50 Oak Street San Francisco, CA 94102	N/A	PC	General Support	500
Tablet Magazine 37 West 28th Street 8th Floor New York, NY 10001	N/A	PC	General Support	360
Total ▶ 3a				252,858

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 Pablove Foundation 6607 West Sunset Boulevard Los Angeles, CA 90028	N/A	PC	General Support	250
Tipping Point 220 Montgomery Street Suite 850 San Francisco, CA 94104	N/A	PC	General Support	1,000
ACE Programs for the Homeless 30-30 Northern Blvd Ste B100 Long Island City, NY 11101	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
California Community Foundation 221 S Figueroa Street 400 Los Angeles, CA 90012	N/A	PC	General Support	500
California Fire Foundation 1780 Creekside Oaks Dr Sacramento, CA 95833	N/A	PC	General Support	500
Center for Science in the Public In 1220 L St NW 300 Washington, DC 20005	N/A	PC	General Support	500
Total ▶ 3a				252,858

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>				
Central California SPCA 103 S Hughes Ave Fresno, CA 93706	N/A	PC	General Support	1,000
Coalition for the Homeless 129 Fulton Street New York, NY 10038	N/A	PC	General Support	300
East Bay Photo Collective1221 E 33rd St Oakland, CA 94610	N/A	PC	General Support	400
Total ▶ 3a				252,858

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				
Food Allergy Research Education 7901 Jones Branch Drive 240 McLean, VA 22102	N/A	PC	General Support	500
Free Library of Philadelphia 1901 Vine Street Suite 111 Philadelphia, PA 19103	N/A	PC	General Support	1,000
Friends of Front Street Animal Shel 2127 Front St Sacramento, CA 95818	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Friends of SFACC1200 15th St San Francisco, CA 94103	N/A	PC	General Support	500
Frontline Journalism Fund1 Guest St Boston, MA 02135	N/A	PC	General Support	500
Kronos QuartetPO Box 225340 San Francisco, CA 94122	N/A	PC	General Support	500
Total ▶ 3a				252,858

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>				
Lev Lalev Fund3 College Road Suite 101 Monsey, NY 10952	N/A	PC	General Support	360
MuttvillePO Box 410207 San Francisco, CA 94141	N/A	PC	General Support	1,000
National Network of Abortion Funds PO Box 170280 Boston, MA 02117	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Native American Heritage Assn PO Box 512 Rapid City, SD 57709	N/A	PC	General Support	240
Rocket Dog RescuePO Box 460826 San Francisco, CA 94146	N/A	PC	General Support	1,000
Sacramento Public Library828 I St Sacramento, CA 95814	N/A	PC	General Support	1,500
Total ▶ 3a				252,858

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 Francis Breadline144 W 32nd St New York, NY 10001	N/A	PC	General Support	400
Stockton Food Bank7 W Scotts Avenue Stockton, CA 95203	N/A	PC	General Support	1,000
The Petey Greene Program 9 Mercer Street Princeton, NJ 08540	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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 Tides CenterPo Box 29903 San Francisco, CA 94129	N/A	PC	General Support	1,000
Tree of Life Synagogue5898 Wilkins Ave Pittsburgh, PA 15217	N/A	PC	General Support	180
Young Community Developers 1715 Yosemite Ave San Francisco, CA 94124	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Bob Woodruff Foundation 1350 Broadway Suite 905 New York, NY 10018	N/A	PC	General Support	500
Camp Blue Spruce 3519 NE 15th Ave 225 Portland, OR 97212	N/A	PC	General Support	500
Canal Alliance91 Larkspur St San Rafael, CA 94901	N/A	PC	General Support	500
Total ▶ 3a				252,858

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>				
First ExposuresPO Box 881971 San Francisco, CA 94188	N/A	PC	General Support	1,000
Mental Health America 500 Montgomery Street Ste 820 Alexandria, VA 22314	N/A	PC	General Support	600
NEO Philanthropy 45 West 36th Street 6th Floor New York, NY 10018	N/A	PC	General Support	300
Total ▶ 3a				252,858

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>				
PEF Israel Endowment 630 Third Ave RM 1500 New York, NY 10017	N/A	PC	General Support	250
Shanti Project730 Polk St 3 San Francisco, CA 94109	N/A	PC	General Support	360
Stomp Out Bullying220 East 57th Street New York, NY 10022	N/A	PC	General Support	515
Total ▶ 3a				252,858

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 Maven Project PO Box 156781 San Francisco, CA 94115	N/A	PC	General Support	1,000
Wikimedia Foundation 1 Montgomery Street Ste 1600 San Francisco, CA 94104	N/A	PC	General Support	100
Wonder Dog Rescue 2211 N First St San Jose, CA 95131	N/A	PC	General Support	2,750
Total ▶ 3a				252,858

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>				
70 Faces Media520 8th Ave 4th Floor New York, NY 10018	N/A	PC	General Support	500
ACTION Council of Monterey County 295 Main Street Suite 500 Salinas, CA 93901	N/A	PC	General Support	180
Alameda County Community Food Bank 7900 Edgewater Drive Oakland, CA 94621	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Amer Friends of Sheba Medical Cente 575 Madison Ave 10th Floor New York, NY 10022	N/A	PC	General Support	1,000
American Friends of Kidum 333 Mamaroneck Avenue 184 White Plains, NY 10605	N/A	PC	General Support	1,000
CARE USA151 Ellis Street NE Atlanta, GA 30303	N/A	PC	General Support	15
Total ▶ 3a				252,858

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>				
Center for Photographic ArtPO Box 1100 Carmel, CA 93921	N/A	PC	General Support	660
Central California Food Bank 4010 E Amendola Dr Fresno, CA 93725	N/A	PC	General Support	1,000
Chabad of Noe Valley3781 Cesar Chavez San Francisco, CA 94110	N/A	PC	General Support	500
Total ▶ 3a				252,858

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>				
Chabad of San Francisco496 Natoma St San Francisco, CA 94103	N/A	PC	General Support	360
City College of San Francisco 50 Frida Kahlo Way San Francisco, CA 94112	N/A	PC	General Support	500
Congregaton Adath Israel 1851 Noriega St San Francisco, CA 94122	N/A	PC	General Support	360
Total ▶ 3a				252,858

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>				
Convent of the Sacred Heart High Sc 2222 Broadway San Francisco, CA 94115	N/A	PC	General Support	350
Dogma Animal RescuePO Box 151 Monte Rio, CA 95462	N/A	PC	General Support	500
Finca International 1201 15th Street NW 8th Fl Washington, DC 20005	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Food Bank for Monterey353 W Rossi St Salinas, CA 93907	N/A	PC	General Support	1,000
Food Bank of Contra Costa Solano 2339 Courage Dr Fairfield, CA 94533	N/A	PC	General Support	1,000
Food Runners of San Francisco 2579 Washington St San Francisco, CA 94115	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Frameline145 Ninth Street 300 San Francisco, CA 94103	N/A	PC	General Support	20
GLBT Historical Society989 Market St San Francisco, CA 94103	N/A	PC	General Support	150
Greater West Portal Neighborhood As PO Box 27116 San Francisco, CA 94127	N/A	PC	General Support	200
Total ▶ 3a				252,858

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>				
Griffin Museum of Photography 67 Shore Road Winchester, MA 01890	N/A	PC	General Support	40
Ignite National510 16th Street Oakland, CA 94612	N/A	PC	General Support	460
Imperial Valley Food Bank 486 W Aten Rd Imperial, CA 92251	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
La Cocina2948 Folsom St San Francisco, CA 94110	N/A	PC	General Support	1,500
Lake Tahoe Wildlife Center 1551 Al Tahoe Blvd South Lake Tahoe, CA 96150	N/A	PC	General Support	1,000
Orbis International 20 8th Avenue 12th Fl New York, NY 10018	N/A	PC	General Support	100
Total ▶ 3a				252,858

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 ParenthoodPOBox 97166 Washington, DC 20090	N/A	PC	General Support	2,000
Pure Vision Arts114 W 17th St New York, NY 10011	N/A	PC	General Support	360
Reboot734 Longmeadow Street Longmeadow, MA 01106	N/A	PC	General Support	540
Total ▶ 3a				252,858

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>				
Redwood Empire Food Bank 3990 Brickway Blvd Santa Rosa, CA 95403	N/A	PC	General Support	1,000
Sacred Heart Cathedral Prep 1055 Ellis St San Francisco, CA 94109	N/A	PC	General Support	100
San Francisco Suicide Prevention PO Box 191350 San Francisco, CA 94119	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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 University High Schoo 3065 Jackson St San Francisco, CA 94115	N/A	PC	General Support	1,000
Season of Sharing FundPO Box 44740 San Francisco, CA 94144	N/A	PC	General Support	1,000
Second Harvest Foodk Bank - Sta Cru 800 Ohlone Pkwy Watsonville, CA 95076	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
SF New Deal2501 Phelps St San Francisco, CA 94124	N/A	PC	General Support	1,000
St Anthony Foundation 150 Golden Gate Ave San Francisco, CA 94102	N/A	PC	General Support	2,500
The Frick Collection1 E 70th St New York, NY 10021	N/A	PC	General Support	300
Total ▶ 3a				252,858

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>				
Truckee Donner Land Trust 11073 Donner Pass Rd Truckee, CA 96161	N/A	PC	General Support	500
Univ of Pennsylvania Med Ctr 3400 Spruce St Philadelphia, PA 19104	N/A	PC	General Support	500
We Were Never Lost 5180 Roswell Rd Suite 203 Atlanta, GA 30342	N/A	PC	General Support	1,000
Total ▶ 3a				252,858

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>				
Whistlestop935 Tamalpais Ave San Rafael, CA 94901	N/A	PC	General Support	360
YMCA of San Francisco 50 California St Suite 650 San Francisco, CA 94111	N/A	PC	General Support	100
Total ▶ 3a				252,858

TY 2020 Accounting Fees Schedule

Name: Ralph & Marsha Guggenheim Family
Foundation

EIN: 26-3873872

Software ID: 20011551

Software Version: 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Tax Prep	2,590	0	0	2,590

TY 2020 Investments Corporate Stock Schedule

Name: Ralph & Marsha Guggenheim Family
Foundation

EIN: 26-3873872

Software ID: 20011551

Software Version: 2020v4.0

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Disney Walt Co, 2,660 Sh	481,939	481,939

TY 2020 Other Expenses Schedule

Name: Ralph & Marsha Guggenheim Family
Foundation

EIN: 26-3873872

Software ID: 20011551

Software Version: 2020v4.0

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank Fees/Credit Card Fees	176	176		
Filing Fees	85			85

TY 2020 Taxes Schedule

Name: Ralph & Marsha Guggenheim Family
Foundation

EIN: 26-3873872

Software ID: 20011551

Software Version: 2020v4.0

Taxes Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise Taxes	1,858			

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 for the latest information.	OMB No. 1545-0047
		2020
Name of the organization Ralph & Marsha Guggenheim Family Foundation		Employer identification number 26-3873872

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 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
Ralph & Marsha Guggenheim Family
Foundation

Employer identification number
26-3873872

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	Ralph Marsha Guggenheim Fam Trust 141 Alton Avenue San Francisco, CA 94116	\$ 119,455	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization Ralph & Marsha Guggenheim Family Foundation	Employer identification number 26-3873872
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Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given (see instructions). Use duplicate copies of Part II if additional space is needed.	(c) FMV (or estimate) (See instructions)	(d) Date received
1	700 Shs Disney	\$ 119,455	2020-12-14
(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 Ralph & Marsha Guggenheim Family Foundation	Employer identification number 26-3873872
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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	