

Return of Private Foundation

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

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

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning

, and ending

Name of foundation MAY AND STANLEY SMITH CHARITABLE TRUST		A Employer identification number ** - *** 2075
Number and street (or P.O. box number if mail is not delivered to street address) 770 TAMALPAIS DRIVE	Room/suite 309	B Telephone number 415-332-0166
City or town, state or province, country, and ZIP or foreign postal code CORTE MADERA, CA 94925		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input checked="" type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 479,457,967.	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d), must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	111,611.		N/A	
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	208,329.	208,329.		STATEMENT 1
	4 Dividends and interest from securities	12,167,322.	10,142,187.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	16,414,431.			
	b Gross sales price for all assets on line 6a	236,287,499.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income	896,657.	-225,296.		STATEMENT 3	
12 Total. Add lines 1 through 11	29,798,350.	10,125,220.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	410,112.			223,909.
	14 Other employee salaries and wages	241,819.			222,315.
	15 Pension plans, employee benefits	42,769.			5,712.
	16a Legal fees STMT 4	17,807.			17,807.
	b Accounting fees STMT 5	50,955.			25,877.
	c Other professional fees STMT 6	3,673,666.			1,863,142.
	17 Interest				
	18 Taxes STMT 7	626,374.			235.
	19 Depreciation and depletion				
	20 Occupancy	82,123.			15,153.
	21 Travel, conferences, and meetings	10,668.			10,554.
	22 Printing and publications				
	23 Other expenses STMT 8	1,315,024.			27,236.
	24 Total operating and administrative expenses. Add lines 13 through 23	6,471,317.			2,411,940.
	25 Contributions, gifts, grants paid	21,064,607.			20,097,607.
26 Total expenses and disbursements. Add lines 24 and 25	27,535,924.	N/A		22,509,547.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	2,262,426.				
b Net investment income (if negative, enter -0-)		10,125,220.			
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only.		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	17,818,083.	20,159,018.	20,159,018.
	3 Accounts receivable ▶ 770,361.			
	Less: allowance for doubtful accounts ▶	718,137.	770,361.	770,361.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use		6,858.	6,858.
	9 Prepaid expenses and deferred charges	17,141.	46,037.	46,037.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 10	289,237,094.	292,740,870.	292,740,870.
	c Investments - corporate bonds STMT 11	67,189,431.	80,800,807.	80,800,807.
	11 Investments - land, buildings, and equipment: basis ▶			
Liabilities	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 12	40,814,384.	84,934,016.	84,934,016.
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	415,794,270.	479,457,967.	479,457,967.
	17 Accounts payable and accrued expenses	1,081,257.	777,447.	
	18 Grants payable	8,030,000.	8,997,000.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶			
	23 Total liabilities (add lines 17 through 22)	9,111,257.	9,774,447.	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29, and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	201,336,001.	201,336,001.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	205,347,012.	268,347,519.	
	29 Total net assets or fund balances	406,683,013.	469,683,520.	
	30 Total liabilities and net assets/fund balances	415,794,270.	479,457,967.	

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	406,683,013.
2 Enter amount from Part I, line 27a	2	2,262,426.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 9	3	60,738,081.
4 Add lines 1, 2, and 3	4	469,683,520.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	469,683,520.

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Part IV Capital Gains and Losses for Tax on Investment Income

N/A

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

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

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

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

N/A

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☐ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018			
2017			
2016			
2015			
2014			

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

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	405,009.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	405,009.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	405,009.
6 Credits/Payments:			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	301,600.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	89,615.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	391,215.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed SEE STATEMENT 13	9	13,794.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2020 estimated tax Refunded	11		

Part VII-A Statements Regarding Activities

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

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address WWW.SMITHCT.ORG		
14 The books are in care of MAY & STANLEY SMITH CHARITABLE TR Telephone no. 415-332-0166 Located at 770 TAMALPAIS DRIVE SUITE 309, CORTE MADERA, CA ZIP+4 94925		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 15 N/A		
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		

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

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

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

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year, did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions **N/A**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
If "Yes" to 6b, file Form 8870.**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **N/A****8** Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ No**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RUTH M. COLLINS	TRUSTEE/CEO			
770 TAMALPAIS DRIVE SUITE 309				
CORTE MADERA, CA 94925	40.00	160,112.	6,763.	0.
DAVID C CUNEO	TRUSTEE			
770 TAMALPAIS DRIVE SUITE 309				
CORTE MADERA, CA 94925	10.00	125,000.	0.	0.
DANIEL F. PIOMBO	TRUSTEE			
770 TAMALPAIS DRIVE SUITE 309				
CORTE MADERA, CA 94925	10.00	125,000.	0.	0.

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

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
RELEVANT WEALTH ADVISORS - 2 BELVEDERE PLACE, SUITE 350, MILL VALLEY, CA 94941	INVESTMENT MANAGER	2,264,142.
ADMINISTRATIVE LLC - 770 TAMALPAIS DRIVE SUITE 309, CORTE MADERA, CA 94925	TRUST ADMINISTRATION	1,372,761.

Total number of others receiving over \$50,000 for professional services 0

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments

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

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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	378,674,522.
b	Average of monthly cash balances	1b	22,316,022.
c	Fair market value of all other assets	1c	59,805,995.
d	Total (add lines 1a, b, and c)	1d	460,796,539.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	460,796,539.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	6,911,948.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	453,884,591.
6	Minimum investment return. Enter 5% of line 5	6	22,694,230.

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	22,694,230.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	405,009.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	48,994.
c	Add lines 2a and 2b	2c	454,003.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	22,240,227.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	22,240,227.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	22,240,227.

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	22,509,547.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	22,509,547.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	22,509,547.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				22,240,227.
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only			18,548,039.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 22,509,547.				
a Applied to 2018, but not more than line 2a ...			18,548,039.	
b Applied to undistributed income of prior years (Election required - see instructions) ...		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				3,961,508.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr. ...			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				18,278,719.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2015 ...				
b Excess from 2016 ...				
c Excess from 2017 ...				
d Excess from 2018 ...				
e Excess from 2019 ...				

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

N/A

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

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

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

SEE STATEMENT 15

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

c Any submission deadlines:

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
GRANTS APPROVED IN 2019, PAYABLE IN FUTURE YEARS	N/A	PUBLIC	GENERAL	8,872,000.
GRANTS APPROVED IN PRIOR YEARS, PAID IN 2019 (INCLUDED ABOVE)	N/A	PC	GENERAL	-7,905,000.
VARIOUS ORGANIZATIONS - CASH BASIS - SEE ATTACHED DETAILS	N/A	PUBLIC	GENERAL	20,097,607.
Total ▶ 3a				21,064,607.
b Approved for future payment				
VARIOUS ORGANIZATIONS - SEE ATTACHED DETAILS	N/A	PUBLIC	GENERAL	8,872,000.
Total ▶ 3b				8,872,000.

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

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2019

Name of the organization

MAY AND STANLEY SMITH CHARITABLE TRUST

Employer identification number

-*2075

Organization type (check one):

Filers of:**Section:**

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

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

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization	Employer identification number
MAY AND STANLEY SMITH CHARITABLE TRUST	** - ***2075

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	ADMINISTRUST LLC 770 TAMALPIAS DRIVE SUITE 309 CORTE MADERA, CA 94925	\$ 111,611.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

-*2075

Part II

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

Name of organization	Employer identification number
MAY AND STANLEY SMITH CHARITABLE TRUST	** - ***2075

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

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

Underpayment of Estimated Tax by Corporations

▶ Attach to the corporation's tax return.

FORM 990-PF

▶ Go to www.irs.gov/Form2220 for instructions and the latest information.

2019

Name

MAY AND STANLEY SMITH CHARITABLE TRUST

Employer identification number

-*2075

Note: Generally, the corporation is not required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2, line 38, on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.

Part I Required Annual Payment

1	Total tax (see instructions)	1	405,009.
2a	Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1	2a	
2b	Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method	2b	
2c	Credit for federal tax paid on fuels (see instructions)	2c	
2d	Total. Add lines 2a through 2c	2d	
3	Subtract line 2d from line 1. If the result is less than \$500, do not complete or file this form. The corporation does not owe the penalty	3	405,009.
4	Enter the tax shown on the corporation's 2018 income tax return. See instructions. Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5	4	374,375.
5	Required annual payment. Enter the smaller of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3	5	374,375.

Part II Reasons for Filing - Check the boxes below that apply. If any boxes are checked, the corporation **must** file Form 2220 even if it does not owe a penalty. See instructions.

- 6 ☐ The corporation is using the adjusted seasonal installment method.
- 7 ☒ The corporation is using the annualized income installment method.
- 8 ☒ The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

Part III Figuring the Underpayment

	(a)	(b)	(c)	(d)
9 Installment due dates. Enter in columns (a) through (d) the 15th day of the 4th (Form 990-PF filers: Use 5th month), 6th, 9th, and 12th months of the corporation's tax year	9 05/15/19	06/15/19	09/15/19	12/15/19
10 Required installments. If the box on line 6 and/or line 7 above is checked, enter the amounts from Sch A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% (0.25) of line 5 above in each column	10			
11 Estimated tax paid or credited for each period. For column (a) only, enter the amount from line 11 on line 15. See instructions	11 93,600.	40,000.	88,000.	80,000.
Complete lines 12 through 18 of one column before going to the next column.				
12 Enter amount, if any, from line 18 of the preceding column	12	93,600.	133,600.	221,600.
13 Add lines 11 and 12	13	133,600.	221,600.	301,600.
14 Add amounts on lines 16 and 17 of the preceding column	14			
15 Subtract line 14 from line 13. If zero or less, enter -0-	15 93,600.	133,600.	221,600.	301,600.
16 If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-	16			
17 Underpayment. If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18	17			
18 Overpayment. If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column	18 93,600.	133,600.	221,600.	

Go to Part IV on page 2 to figure the penalty. Do not go to Part IV if there are no entries on line 17 - no penalty is owed.

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 2220 (2019)

Part IV Figuring the Penalty

	(a)	(b)	(c)	(d)
19 Enter the date of payment or the 15th day of the 4th month after the close of the tax year, whichever is earlier. (C corporations with tax years ending June 30 and S corporations: Use 3rd month instead of 4th month. Form 990-PF and Form 990-T filers: Use 5th month instead of 4th month.) See instructions	19			
20 Number of days from due date of installment on line 9 to the date shown on line 19	20			
21 Number of days on line 20 after 4/15/2019 and before 7/1/2019	21			
22 Underpayment on line 17 x $\frac{\text{Number of days on line 21} \times 6\% (0.06)}{365}$...	22 \$	\$	\$	\$
23 Number of days on line 20 after 06/30/2019 and before 10/1/2019 ...	23			
24 Underpayment on line 17 x $\frac{\text{Number of days on line 23} \times 5\% (0.05)}{365}$...	24 \$	\$	\$	\$
25 Number of days on line 20 after 9/30/2019 and before 1/1/2020	25			
26 Underpayment on line 17 x $\frac{\text{Number of days on line 25} \times 5\% (0.05)}{365}$...	26 \$	\$	\$	\$
27 Number of days on line 20 after 12/31/2019 and before 4/1/2020 ...	27			
28 Underpayment on line 17 x $\frac{\text{Number of days on line 27} \times 5\% (0.05)}{366}$...	28 \$	\$	\$	\$
29 Number of days on line 20 after 3/31/2020 and before 7/1/2020	29			
30 Underpayment on line 17 x $\frac{\text{Number of days on line 29} \times \%}{366}$	30 \$	\$	\$	\$
31 Number of days on line 20 after 6/30/2020 and before 10/1/2020 ...	31			
32 Underpayment on line 17 x $\frac{\text{Number of days on line 31} \times \%}{366}$	32 \$	\$	\$	\$
33 Number of days on line 20 after 9/30/2020 and before 1/1/2021	33			
34 Underpayment on line 17 x $\frac{\text{Number of days on line 33} \times \%}{366}$	34 \$	\$	\$	\$
35 Number of days on line 20 after 12/31/2020 and before 3/16/2021 ...	35			
36 Underpayment on line 17 x $\frac{\text{Number of days on line 35} \times \%}{365}$	36 \$	\$	\$	\$
37 Add lines 22, 24, 26, 28, 30, 32, 34, and 36	37 \$	\$	\$	\$
38 Penalty. Add columns (a) through (d) of line 37. Enter the total here and on Form 1120, line 34; or the comparable line for other income tax returns	38			0.

* Use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at www.irs.gov. You can also call 1-800-829-4933 to get interest rate information.

Schedule A Adjusted Seasonal Installment Method and Annualized Income Installment Method

See instructions.

Form 1120-S filers: For lines 1, 2, 3, and 21, "taxable income" refers to excess net passive income or the amount on which tax is imposed under section 1374(a), whichever applies.

Part I Adjusted Seasonal Installment Method

Caution: Use this method only if the base period percentage for any 6 consecutive months is at least 70%.
See instructions.

		(a)	(b)	(c)	(d)
		First 3 months	First 5 months	First 8 months	First 11 months
1 Enter taxable income for the following periods.					
a Tax year beginning in 2016	1a				
b Tax year beginning in 2017	1b				
c Tax year beginning in 2018	1c				
2 Enter taxable income for each period for the tax year beginning in 2019. See the instructions for the treatment of extraordinary items	2				
3 Enter taxable income for the following periods.		First 4 months	First 6 months	First 9 months	Entire year
a Tax year beginning in 2016	3a				
b Tax year beginning in 2017	3b				
c Tax year beginning in 2018	3c				
4 Divide the amount in each column on line 1a by the amount in column (d) on line 3a	4				
5 Divide the amount in each column on line 1b by the amount in column (d) on line 3b	5				
6 Divide the amount in each column on line 1c by the amount in column (d) on line 3c	6				
7 Add lines 4 through 6	7				
8 Divide line 7 by 3.0	8				
9a Divide line 2 by line 8	9a				
b Extraordinary items (see instructions)	9b				
c Add lines 9a and 9b	9c				
10 Figure the tax on the amt on ln 9c using the instr for Form 1120, Sch J, line 2, or comparable line of corp's return ...	10				
11a Divide the amount in columns (a) through (c) on line 3a by the amount in column (d) on line 3a	11a				
b Divide the amount in columns (a) through (c) on line 3b by the amount in column (d) on line 3b	11b				
c Divide the amount in columns (a) through (c) on line 3c by the amount in column (d) on line 3c	11c				
12 Add lines 11a through 11c	12				
13 Divide line 12 by 3.0	13				
14 Multiply the amount in columns (a) through (c) of line 10 by columns (a) through (c) of line 13. In column (d), enter the amount from line 10, column (d)	14				
15 Enter any alternative minimum tax (trusts only) for each payment period. See instructions	15				
16 Enter any other taxes for each payment period. See instr.	16				
17 Add lines 14 through 16	17				
18 For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions	18				
19 Total tax after credits. Subtract line 18 from line 17. If zero or less, enter -0-	19				

Part II Annualized Income Installment Method

		(a)	(b)	(c)	(d)
		First <u>2</u> months	First <u>4</u> months	First <u>7</u> months	First <u>10</u> months
20 Annualization periods (see instructions)	20				
21 Enter taxable income for each annualization period. See instructions for the treatment of extraordinary items	21				
22 Annualization amounts (see instructions)	22	6.000000	3.000000	1.714290	1.200000
23a Annualized taxable income. Multiply line 21 by line 22 ..	23a				
b Extraordinary items (see instructions)	23b				
c Add lines 23a and 23b	23c				
24 Figure the tax on the amount on line 23c using the instructions for Form 1120, Schedule J, line 2, or comparable line of corporation's return	24				
25 Enter any alternative minimum tax (trusts only) for each payment period (see instructions)	25				
26 Enter any other taxes for each payment period. See instr.	26				
27 Total tax. Add lines 24 through 26	27				
28 For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions	28				
29 Total tax after credits. Subtract line 28 from line 27. If zero or less, enter -0-	29				
30 Applicable percentage	30	25%	50%	75%	100%
31 Multiply line 29 by line 30	31				

Part III Required Installments

		1st installment	2nd installment	3rd installment	4th installment
Note: Complete lines 32 through 38 of one column before completing the next column.					
32 If only Part I or Part II is completed, enter the amount in each column from line 19 or line 31. If both parts are completed, enter the smaller of the amounts in each column from line 19 or line 31	32	0.	0.	0.	0.
33 Add the amounts in all preceding columns of line 38. See instructions	33				
34 Adjusted seasonal or annualized income installments. Subtract line 33 from line 32. If zero or less, enter -0- ..	34				
35 Enter 25% (0.25) of line 5 on page 1 of Form 2220 in each column. Note: "Large corporations," see the instructions for line 10 for the amounts to enter	35	93,594.	108,911.	101,252.	101,253.
36 Subtract line 38 of the preceding column from line 37 of the preceding column	36		93,594.	202,505.	303,757.
37 Add lines 35 and 36	37	93,594.	202,505.	303,757.	405,010.
38 Required installments. Enter the smaller of line 34 or line 37 here and on page 1 of Form 2220, line 10. See instructions	38	0.	0.	0.	0.

Form 2220 (2019)

** ANNUALIZED INCOME INSTALLMENT METHOD USING OPTION 1

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST INCOME	208,329.	208,329.	
TOTAL TO PART I, LINE 3	208,329.	208,329.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CRYSTAL CAPITAL FUND SERIES LLC - DIVIDENDS	179,845.	0.	179,845.	126,802.	
CRYSTAL CAPITAL FUND SERIES LLC - INTEREST	518,150.	0.	518,150.	472,667.	
LONG TERM CAPITAL GAIN DISTRIBUTIONS	4,363,310.	4,363,310.	0.	0.	
MARCH CAPITAL OPPORTUNITIES FUND - INTEREST	13,727.	0.	13,727.	13,727.	
RENAISSANCE INSTITUTIONAL EQUITIES FUND -	585,704.	0.	585,704.	418,492.	
RENAISSANCE INSTITUTIONAL EQUITIES FUND -	42,054.	0.	42,054.	35,181.	
SFFRF II - DIVIDENDS	1,187,255.	0.	1,187,255.	1,187,255.	
SFFRF II - INTEREST	1,000.	0.	1,000.	1,000.	
SFFRF III - DIVIDENDS	109,859.	0.	109,859.	109,859.	
US CORPORATE DIVIDENDS	9,529,728.	0.	9,529,728.	7,777,204.	
TO PART I, LINE 4	16,530,632.	4,363,310.	12,167,322.	10,142,187.	

FORM 990-PF	OTHER INCOME		STATEMENT	3
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
OTHER INCOME	7,423.	0.		
JP MORGAN CHASE & CO ALERIAN MLP INDEX	380,213.	380,213.		
K-1 RENAISSANCE INSTITUTIONAL - OTHER INVESTMENT INCOME	21,370.	21,370.		
K-1 MARCH CAPITAL OPP FUND - OTHER INVESTMENT INCOME	-333,762.	-333,762.		
K-1 CRYSTAL CAPITAL FUND SERIES LLC - OTHER INVESTMENT INCOME	-293,117.	-293,117.		
K-1 MARCH CAPITAL OPP FUND - UBTI	93,294.	0.		
K-1 CRYSTAL CAPITAL FUND SERIES LLC - UBTI	181,412.	0.		
K-1S OTHER INVESTMENT INCOME	839,824.	0.		
TOTAL TO FORM 990-PF, PART I, LINE 11	896,657.	-225,296.		

FORM 990-PF	LEGAL FEES		STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	17,807.			17,807.
TO FM 990-PF, PG 1, LN 16A	17,807.			17,807.

FORM 990-PF	ACCOUNTING FEES		STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	10,830.			5,815.
ACCOUNTING FEES	40,125.			20,062.
TO FORM 990-PF, PG 1, LN 16B	50,955.			25,877.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT FEES	2,264,142.			0.	
ADMINISTRATION COSTS	1,372,761.			1,826,391.	
CONSULTANT FEES	36,763.			36,751.	
TO FORM 990-PF, PG 1, LN 16C	3,673,666.			1,863,142.	

FORM 990-PF	TAXES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL EXCISE TAX	391,215.			0.	
CA FILING FEES	235.			235.	
CALIFORNIA UBTI	1,612.			0.	
FEDERAL UBTI	15,436.			0.	
FOREIGN TAXES	198,193.			0.	
PAYROLL TAXES	19,683.			0.	
TO FORM 990-PF, PG 1, LN 18	626,374.			235.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BANK FEES	1,484.			1,264.	
INVESTMENT	1,286,612.			0.	
INSURANCE	1,834.			981.	
MEMBERSHIPS	11,133.			11,118.	
OFFICE EXPENSE, SUBSCRIPTIONS	12,027.			11,940.	
TELECOMMUNICATIONS, UTILITIES	1,934.			1,933.	
TO FORM 990-PF, PG 1, LN 23	1,315,024.			27,236.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	9
DESCRIPTION		AMOUNT	
UNREALIZED GAINS AND UNREALIZED FOREIGN CURRENCY ADJUSTMENTS		60,738,081.	
TOTAL TO FORM 990-PF, PART III, LINE 3		60,738,081.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	10
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE STOCK	292,799,540.	292,799,540.	
OPTIONS	-58,670.	-58,670.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	292,740,870.	292,740,870.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	11
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE BONDS (US)	80,800,807.	80,800,807.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	80,800,807.	80,800,807.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	12
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SFF REALTY FUND II	FMV	20,818,702.	20,818,702.
SFF REALTY FUND III	FMV	5,585,324.	5,585,324.
RENAISSANCE INST EQUITY FUND	FMV	22,369,896.	22,369,896.
MARCH CAPITAL OPPORTUNITY FUND III	FMV	6,043,032.	6,043,032.
CRYSTAL CAPITAL FUND SERIES LLC	FMV	30,117,062.	30,117,062.
TOTAL TO FORM 990-PF, PART II, LINE 13		84,934,016.	84,934,016.

FORM 990-PF	INTEREST AND PENALTIES	STATEMENT 13
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TAX DUE FROM FORM 990-PF, PART VI	13,794.
LATE PAYMENT INTEREST	141.

TOTAL AMOUNT DUE	13,935.
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FORM 990-PF	LATE PAYMENT INTEREST	STATEMENT 14
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DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST
TAX DUE	07/15/20	103,409.	103,409.	.0300		
EXTENSION PAYMENT	07/15/20	-89,615.	13,794.	.0300	124	141.
DATE FILED	11/16/20		13,935.			
TOTAL LATE PAYMENT INTEREST						141.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT	15
	PART XV, LINES 2A THROUGH 2D		

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

WILLIAM SMITH, WEBSITE: WWW.SMITHCT.ORG
770 TAMALPAIS DRIVE #309
CORTE MADERA, CA 94925

TELEPHONE NUMBER

415-332-0166

FORM AND CONTENT OF APPLICATIONS

SEE WEBSITE FOR APPLICATION GUIDELINES: WWW.SMITHCT.ORG

ANY SUBMISSION DEADLINES

NO SUBMISSION DEADLINES.

RESTRICTIONS AND LIMITATIONS ON AWARDS

PARTICULAR INTERESTS: FOSTER CHILDREN AND YOUTH, MILITARY VETERANS AND THEIR FAMILIES, ELDERS: ADULTS OVER AGE 60, PEOPLE WITH DISABILITIES: ADULTS AND YOUTH TRANSITIONING TO ADULTHOOD LIVING WITH PHYSICAL, INTELLECTUAL, OR DEVELOPMENTAL DISABILITIES. GEOGRAPHIC AREA SERVED: WESTERN REGION OF THE UNITED STATES; BRITISH COLUMBIA, CANADA.

GENERAL EXPLANATION

STATEMENT 16

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

PART VII-B - 2019 RELATED PARTY FOOTNOTE:

EXPLANATION:

A TRUSTEE OWNS THE COMPANY THAT PROVIDES ADMINISTRATIVE SERVICES TO THE TRUST. THE COMPANY WAS PAID \$1,372,761 IN 2019.

A TRUSTEE OF THE TRUST IS AN OFFICER IN THE COMPANY THAT PROVIDES TAX RETURN PREPARATION SERVICES TO THE TRUST. THE COMPANY WAS PAID \$10,830 IN 2019.

A TRUSTEE SERVES AS THE CEO FOR THE TRUST, RECEIVING \$35,112 IN 2019.

THE PAYMENT OF COMPENSATION TO THESE DISQUALIFIED PERSONS FOR PERSONAL SERVICES IS REASONABLE AND NECESSARY IN CARRYING OUT THE EXEMPT PURPOSE OF THE PRIVATE FOUNDATION AND ARE NOT CONSIDERED ACTS OF SELF DEALING.

Security Positions Report

Units	Name	Unit Cost	Cost Basis	Ending Value
XXXX0202 - MAY & STANLEY SMITH CHARITABLE TRUST - RWA				
	■ US Equities			
50,000.00	ABBOTT LABS COM	85.26	4,262,798.00	4,343,000.00
14,000.00	ADOBE INC COM	101.79	1,425,022.95	4,617,340.00
4,600.00	ALPHABET INC CAP STK CL A	754.50	3,470,716.08	6,161,194.00
3,000.00	AMAZON COM INC COM	574.58	1,723,735.16	5,543,520.00
19,000.00	AMGEN INC COM	225.44	4,283,317.40	4,580,330.00
22,000.00	APPLE INC COM	61.35	1,349,767.29	6,460,300.00
13,500.00	BOEING COMPANY	322.29	4,350,981.45	4,397,760.00
2,400.00	BOOKING HLDGS INC COM	1,897.80	4,554,712.68	4,928,952.00
48,000.00	CAPITAL ONE FINL CORP COM	96.13	4,614,094.20	4,939,680.00
115,000.00	CIENA CORP COM NEW	37.43	4,304,648.50	4,909,350.00
238,380.95	DODGE & COX STOCK FUND	193.38	46,098,665.10	46,188,692.09
77,000.00	FIRST SOLAR INC COM	52.04	4,006,844.30	4,308,920.00
44,000.00	FISERV INC COM	102.79	4,522,952.20	5,087,720.00
19,000.00	GOLDMAN SACHS GROUP INC COM	231.58	4,399,937.50	4,368,670.00
13,100.00	LOCKHEED MARTIN CORP COM	306.76	4,018,496.12	5,100,878.00
30,000.00	MICROSOFT CORP COM	95.17	2,855,005.96	4,731,000.00
177,000.00	SPDR S&P 500 ETF	250.69	44,372,635.93	56,969,220.00
38,000.00	SPLUNK INC COM	116.56	4,429,469.20	5,691,260.00
20,400.00	SVB FINL GROUP COM	206.62	4,215,025.30	5,121,216.00
155,000.00	TWITTER INC COM	29.94	4,640,920.00	4,967,750.00
34,000.00	UNITED TECHNOLOGIES CORP COM	136.25	4,632,642.40	5,091,840.00
16,500.00	UNITEDHEALTH GROUP INC COM	197.85	3,264,498.68	4,850,670.00
72,000.00	VERIZON COMMUNICATIONS INC COM	59.33	4,272,108.60	4,420,800.00
110,000.00	VIACOMCBS INC CL B	41.60	4,576,388.00	4,616,700.00
26,000.00	VISA INC COM CL A	78.19	2,032,912.55	4,885,400.00

RWA relies on third parties to provide pricing for all securities shown on this report. Certain securities may have unique valuation requirements. Certain security prices may not be current as of the statement date, and certain adjustments to your holdings may not yet have been included.

Security Positions Report

Units	Name	Unit Cost	Cost Basis	Ending Value
			176,678,295.54	217,282,162.09
<div>International Equities</div>				
745,595.65	DFA INTERNATIONAL CORE EQUITY PORTFOLIO	14.49	10,803,680.89	10,296,675.85
156,000.00	ISHARES MSCI CHINA ETF	60.30	9,406,286.09	9,998,040.00
150,000.00	KRANESHARES BOSERA MSCI CHINA A ETF	29.91	4,486,263.00	4,893,000.00
614,482.17	OAKMARK INTL FD ADV	24.09	14,802,875.52	15,306,750.90
281,458.69	T. ROWE PRICE EMERGING MARKETS	43.79	12,323,791.69	13,175,081.18
197,000.00	VANGUARD TOTAL INTERNATIONAL STOCK ETF	58.55	11,534,391.19	10,970,930.00
			63,357,288.38	64,640,477.93
<div>US Fixed Income</div>				
1,542,713.57	BLACKROCK STRATEGIC INCOME OPPORTUNITIES PORTFOLIO INSTITUTIONAL SHARES	9.98	15,396,566.03	15,380,854.27
1,510,836.35	DOUBLELINE FDS TR TTL RTN BD I	11.05	16,698,765.23	16,060,190.43
1,643,662.66	PIMCO INCOME FUND INSTITUTIONAL FUND	11.92	19,596,838.18	19,789,698.37
1,036,134.49	PRUDENTIAL TOTAL RETURN BOND FUND CLASS Z	14.62	15,147,871.15	14,920,336.58
2,080,927.14	PUTNAM DIVERSIFIED INCOME FUND CLASS Y	6.87	14,300,000.00	14,649,727.08
			81,140,040.59	80,800,806.73
<div>Alternative Assets</div>				
170,000.00	BLACKSTONE MTG TR INC COM CL A	29.10	4,947,704.73	6,327,400.00
140,000.00	INVESCO MORTGAGE CAPITAL INC COM	15.42	2,158,369.00	2,331,000.00
290,000.00	MFA FINL INC COM	7.63	2,213,834.00	2,218,500.00
			9,319,907.73	10,876,900.00
<div>Options</div>				
-204.00	CALL (SIVB) SVB FINL GROUP 01/17/2020 @ \$270	1.61	-32,816.07	-13,260.00
-380.00	CALL (SPLK) SPLUNK INC 01/17/2020 @ \$160	0.87	-33,033.96	-26,600.00
-165.00	CALL (UNH) UNITEDHEALTH GROUP INC 01/17/2020 @ \$310	1.23	-20,318.17	-18,810.00
			-86,168.20	-58,670.00
<div>Money Markets</div>				

May and Stanley Smith Charitable Trust

94-6622075

Form 990-PF - Part XV Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment
For Year Ended December 31, 2019**3a. Paid during the year**

Recipient Name and Address	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 Paid in 2019
A Home Within Inc. Oakland, CA	N/A	PC	To provide mental health services for foster youth and support to the adults who care for them	\$75,000
Abilities United Redwood City, CA	N/A	PC	To provide inclusive services and support for adults with disabilities	\$75,000
Adoptive Families Association of British Columbia Burnaby, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To support foster youth and adoptive families in British Columbia	\$50,000
Advancement Through Opportunity and Knowledge Incorporated Los Angeles, CA	N/A	PC	To support foster youth to graduate high school and succeed in post-secondary education	\$75,000
Affordable Living for the Aging West Hollywood, CA	N/A	PC	To provide low-income older adults with supportive housing and home-sharing facilitation	\$50,000
Alliance For Childrens Rights Los Angeles, CA	N/A	PC	To ensure L.A.'s foster youth have access to stable homes, health care, and education	\$125,000
Alzheimers Family Services Center Huntington Beach, CA	N/A	PC	To provide adult day programming and caregiver services to families impacted by dementia related illnesses	\$75,000
Another Chance House Amarillo, TX	N/A	PC	To provide housing and supportive services to homeless veterans in the Texas panhandle	\$40,000
Arc California Sacramento, CA	N/A	PC	To advocate for and protect the rights of people with I/DD and support their full inclusion in the community	\$100,000
Assistance Dogs of the West Santa Fe, NM	N/A	PC	To support the Warrior Canine Connection program using veterans as trainers	\$70,000
Bay Area Outreach and Recreation Program Berkeley, CA	N/A	PC	To provide sports, recreation, & outdoor adventures to people with physical & visual disabilities	\$40,000
BC Aboriginal Network on Disability Society Victoria, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide case management/navigation services for Indigenous adults with disabilities on reservations and in the community	\$100,000
Becoming Independent Santa Rosa, CA	N/A	PC	To support people with I/DD through job training and community-based employment	\$75,000
Bend the Arc-A Jewish Partnership for Justice New York, NY	N/A	PC	To advance state policies that support caregivers, elders, and people with disabilities	\$250,000

May and Stanley Smith Charitable Trust

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Form 990-PF - Part XV Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment
For Year Ended December 31, 2019

Best Buddies International Inc. Miami, FL	N/A	PC	To provide inclusive, supported employment opportunities in professional work environments for young adults with I/DD	\$150,000
Bet Tzedek Los Angeles, CA	N/A	PC	To provide free legal services to low-income adults with I/DD and their families/caregivers	\$75,000
Beyond Emancipation Oakland, CA	N/A	PC	To support Alameda County's foster youth to enroll and succeed in post-secondary programs	\$75,000
Big Brothers Big Sisters of San Diego County Inc. San Diego, CA	N/A	PC	To provide mentoring support for military children in the San Diego area	\$100,000
Blue Star Families Inc. Encinitas, CA	N/A	PC	To provide community connection and support to military families	\$100,000
Blue Star Recyclers Colorado Springs, CO	N/A	PC	To promote inclusive employment for young adults with autism and other disabilities in electronics recycling companies	\$100,000
BoardSource Washington, DC	N/A	PC	2019 Membership Dues	\$3,500
Bob Woodruff Family Foundation Inc. New York , NY	N/A	PC	To support the work of the National Veterans Intermediary to build collaborative communities to serve veterans	\$100,000
Bread & Roses Presents Corte Madera, CA	N/A	PC	To improve quality of life for elders in long-term care through high quality live entertainment	\$40,000
Bridge Meadows Portland, OR	N/A	PC	To create and sustain intergenerational communities for foster youth, adoptive families, & elders	\$75,000
Bridges from School to Work Inc. Bethesda, MD	N/A	PC	To transform the lives of young adults with disabilities through the power of a job	\$100,000
Cal State Fullerton Philanthropic Foundation Fullerton, CA	N/A	PC	To support foster youth to graduate from college	\$50,000
California Youth Connection Emeryville, CA	N/A	PC	To develop foster youths' leadership and advocacy skills	\$100,000
Camp For All Foundation Houston, TX	N/A	PC	To provide a barrier-free camp experience for adults and transitioning youth with disabilities	\$50,000
Candid Williamsburg, VA	N/A	PC	2019 Membership Dues	\$1,976
Candid Williamsburg, VA	N/A	PC	2019 Membership Dues	\$6,625

May and Stanley Smith Charitable Trust

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For Year Ended December 31, 2019

Canine Companions For Independence Santa Rosa, CA	N/A	PC	To provide trained assistance dogs for adults who are deaf or hard of hearing	\$100,000
Caregivers Volunteers Assisting the Elderly Ventura, CA	N/A	PC	To provide trained volunteer support to enable homebound elders to live independently	\$60,000
CASA of Los Angeles Monterey Park, CA	N/A	PC	To provide foster youth with trained volunteers who serve as advocates and mentors	\$50,000
Catholic Charities Of The Archdiocese Of Galveston-Houston Houston, TX	N/A	PC	To provide counseling, career support, housing and other assistance to low-income women veterans in the Houston area	\$100,000
Catholic Community Services Of Southern Arizona Inc. Tucson, AZ	N/A	PC	To provide services and support for adults who are deaf, deaf-blind, or deaf-disabled	\$100,000
Center for Disaster Philanthropy Inc. Washington, DC	N/A	PC	To coordinate and inform disaster philanthropy efforts, and to fund Hurricane Harvey recovery in three counties	\$155,000
Center for Innovation Inc. Linthicum, MD	N/A	PC	To deinstitutionalize long-term care and advance a person-centered approach in elder care	\$250,000
Central New Mexico Community College Foundation Inc. Albuquerque, NM	N/A	PC	To support the student Veterans Resource Center at Central New Mexico Community College	\$55,000
Channel Islands Young Men's Christian Association Santa Barbara, CA	N/A	PC	To provide case management and transitional housing to former foster and homeless youth	\$35,000
Child Advocates of Silicon Valley Inc. Milpitas, CA	N/A	PC	To provide foster youth with trained volunteers who serve as advocates and mentors	\$40,000
Child Bridge Inc. Bigfork, MT	N/A	PC	To recruit and support foster and adoptive families in Montana	\$40,000
Children and Youth Justice Center Seattle, WA	N/A	PC	To support foster, homeless, and juvenile justice-involved youth in Washington State	\$50,000
Children Now Oakland, CA	N/A	PC	To support policies and practices that improve children's health, education, and well-being	\$100,000
Children's Rights Inc. New York, NY	N/A	PC	To ensure LGBTQ youth are safe and supported when in out-of-home care	\$100,000
Churchie Foundation Limited East Brisbane, Australia	N/A	NC (Foreign Public Charity Equivalent)	To provide scholarships and financial aid to students at Anglican Church Grammar School	\$125,000
Civic Ventures San Francisco, CA	N/A	PC	To create a society that views older adults, as valuable intergenerational contributors	\$250,000

May and Stanley Smith Charitable Trust

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Form 990-PF - Part XV Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment
For Year Ended December 31, 2019

Columbus Foundation Inc. Salt Lake City, UT	N/A	PC	To provide employment-related training and placement services for young adults with Autism Spectrum Disorder (ASD) and engage potential employers	\$55,000
Combined Arms Houston, TX	N/A	PC	To support collaborative efforts to serve veterans in the Houston area	\$50,000
Community Entry Services Inc. Riverton, WY	N/A	PC	To empower adults with disabilities to maximize their independence and lead satisfying and productive lives in the community	\$75,000
Community Living Campaign San Francisco, CA	N/A	PC	To support and empower older adults to plan for their care needs in order to safely age in place	\$70,000
Community Music Center San Francisco, CA	N/A	PC	To foster community engagement and lifelong learning for older adults through choir participation	\$60,000
Conejo Valley Senior Concerns Thousand Oaks, CA	N/A	PC	To provide supportive services for elders and family caregivers	\$50,000
Council on Foundations Inc. Baltimore, MD	N/A	PC	To support the 2019 convenings of the Veterans Philanthropy Exchange	\$10,000
Council on Foundations Inc. Baltimore, MD	N/A	PC	2019 Membership Dues	\$19,600
Court Appointed Special Advocates Of Travis County Austin, TX	N/A	PC	To support foster youth transitioning out of the foster care system	\$50,000
Covenant House Alaska Anchorage, AK	N/A	PC	To support Alaska's youth who are homeless or at risk of homelessness	\$100,000
Creative Growth Inc. Oakland, CA	N/A	PC	To provide expressive and professional artistic opportunities for adults with disabilities	\$50,000
Denver Indian Family Resource Center Denver, CO	N/A	PC	To support vulnerable Native American families and prevent child welfare involvement	\$50,000
Depaul UK London, United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To provide emergency and transitional housing and supportive services to disadvantaged youth in London	\$100,000
Disability In Alexandria, VA	N/A	PC	To support businesses in achieving disability inclusion in the workplace	\$250,000
Disabled Sports USA Rockville, MD	N/A	PC	To encourage low-income young adults with disabilities to engage in sports	\$80,000
Downtown Women's Center Los Angeles, CA	N/A	PC	To provide rapid rehousing and case management to homeless women veterans in Los Angeles	\$100,000

May and Stanley Smith Charitable Trust

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Form 990-PF - Part XV Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment
For Year Ended December 31, 2019

Duet Partners In Health & Aging Inc. Phoenix, AZ	N/A	PC	To provide volunteer-assisted transportation and support to homebound elders	\$60,000
Ebenezer School and Home for the Visually Impaired Ltd. Pokfulam, Hong Kong	N/A	NC (Foreign Public Charity Equivalent)	To provide student focused services not covered by government funds for visually impaired children	\$30,000
Eldergivers San Francisco, CA	N/A	PC	To support older adults in senior centers and long-term care facilities to create and share their art	\$20,000
Elderhelp of San Diego San Diego, CA	N/A	PC	To support elders' independence and quality of life by providing trained volunteer support	\$60,000
Empact-Suicide Prevention Center Tempe, AZ	N/A	PC	To provide crisis response and navigation services to service members/veterans and their families in Maricopa County, Arizona	\$75,000
Every Child Counts Abaco, The Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To provide educational opportunities for children and youth with developmental and physical disabilities and recovery from Hurricane Dorian	\$40,000
Experience Matters Consortium Inc. Phoenix, AZ	N/A	PC	To leverage the skills and talents of adults age 50+ to build capacity of local nonprofits	\$60,000
Extraordinary Families Los Angeles, CA	N/A	PC	To recruit and support families for foster youth and support youth aging out of foster care	\$125,000
Family Builders By Adoption Oakland, CA	N/A	PC	To find permanent families for children and youth in the Bay Area	\$50,000
Family Caregiver Alliance San Francisco, CA	N/A	PC	To provide comprehensive information, training, and support to family caregivers	\$75,000
Family Eldercare Inc. Austin, TX	N/A	PC	To help elders age in place through coordination of and connections to needed services	\$100,000
Farmer Veteran Coalition Davis, CA	N/A	PC	To support veterans pursuing careers in agriculture with mentoring and resources	\$125,000
First Place for Youth Oakland, CA	N/A	PC	To provide housing and wraparound services to youth transitioning from foster care	\$125,000
Food For Thought Forestville, CA	N/A	PC	To provide nutritious, medically tailored meals and congregate lunches for low-income elders	\$75,000
Foster Youth in Action Berkeley, CA	N/A	PC	To develop foster youth advocacy skills and build capacity of foster youth-serving organizations	\$60,000
Fosterclub Seaside, OR	N/A	PC	To support former foster youth to access and maintain health care coverage	\$125,000

May and Stanley Smith Charitable Trust

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Form 990-PF - Part XV Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment
For Year Ended December 31, 2019

Fostering Media Connections Los Angeles, CA	N/A	PC	To use solution-based journalism to advance child welfare reform	\$60,000
Foundation for Students Rising Above San Francisco, CA	N/A	PC	To support foster youth to graduate from college and succeed in the workforce	\$50,000
Freedom Service Dogs Inc. Englewood, CO	N/A	PC	To provide custom-trained service dogs for people with disabilities	\$50,000
Friends of the Children - National Office Portland, OR	N/A	PC	To provide long-term one-on-one mentoring and support to at-risk youth and families	\$100,000
Friends of the Children Seattle Seattle, WA	N/A	PC	To provide long-term mentoring for at-risk children in King County, WA	\$65,000
Friendship Adult Day Care Center Inc. Santa Barbara, CA	N/A	PC	To provide day programs and respite to support those living with dementia related illness and their caregivers	\$40,000
Funders Together to End Homelessness Inc Boston, MA	N/A	PC	2019 Membership Dues	\$3,000
Grantmakers for Effective Organizations Washington, DC	N/A	PC	2019 Membership Dues	\$7,390
Grantmakers In Aging Inc. Arlington, VA	N/A	PC	2019 Membership Dues	\$5,000
Grantmakers In Aging Inc. Arlington, VA	N/A	PC	To support the field of philanthropy to address the transportation needs of older adults	\$70,000
Guiding Eyes for the Blind Inc. Yorktown Heights, NY	N/A	PC	To enrich the lives of adults with multiple disabilities including visual impairment	\$25,000
Head Strong Project Inc. New York, NY	N/A	PC	To provide mental health care to post-9/11 veterans in the Western U.S.	\$150,000
Heart & Soul Salt Lake City, UT	N/A	PC	To improve quality of life for elders in long-term care through high quality live entertainment	\$50,000
Hearts & Minds Activity Center San Jose, CA	N/A	PC	To provide social day programs for elders with dementia and support for their family caregivers	\$52,000
Highline College Foundation Des Moines, WA	N/A	PC	To empower transitioning youth to bridge successfully into the community by offering professional-technical certificates in an inclusive college setting	\$50,000
Hire Heroes USA Alpharetta, GA	N/A	PC	To provide personalized career assistance to transitioning service members, veterans, and spouses	\$200,000

May and Stanley Smith Charitable Trust

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Form 990-PF - Part XV Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment
For Year Ended December 31, 2019

Home Front Military Network Colorado Springs, CO	N/A	PC	To provide a coordinated entry point to access services for military service members, veterans, and their families	\$50,000
Homeless Youth Alliance Inc. San Francisco, CA	N/A	PC	To provide supportive services to homeless youth in San Francisco	\$40,000
Homes for Families Woodland Hills, CA	N/A	PC	To provide supportive services for veterans and families transitioning into permanent housing	\$80,000
Homeward Bound of Marin Novato, CA	N/A	PC	To provide housing and employment services to homeless veterans in Marin County	\$100,000
Houston Community College Foundation Houston, TX	N/A	PC	To support travel expenses for the 2020 Zero Project Conference	\$10,000
Houston Community College Foundation Houston, TX	N/A	PC	To support independent living and workplace opportunities for college students with I/DD	\$50,000
Human Rights Watch Inc. New York, NY	N/A	PC	To protect older adults in long-term care settings from neglect and overuse of anti-psychotic medications	\$120,000
Immigrant Legal Resource Center San Francisco, CA	N/A	PC	To support immigrant children and families within the child welfare system	\$50,000
Inclusion BC Society New Westminster, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To be the convener, conduit, and collective public voice for local Community Living member agencies serving people with disabilities across British Columbia	\$60,000
Individuals Now Inc. Social Advocates For Youth Santa Rosa, CA	N/A	PC	To provide housing and supportive services to homeless and former foster youth	\$75,000
Inner City Law Center Los Angeles, CA	N/A	PC	To provide free legal services to homeless, low-income veterans in Los Angeles	\$100,000
Institute On Aging San Francisco, CA	N/A	PC	To provide necessary supports and services to enable older adults to age in place	\$100,000
Interfaith Carepartners Inc. Houston, TX	N/A	PC	To provide social events and in-home care for elders with dementia, and respite for caregivers	\$35,000
Interfaith Community Services Inc. Escondido, CA	N/A	PC	To provide mental health services to low-income veterans in Northern San Diego County	\$125,000
Jewish Family & Childrens Services San Francisco, CA	N/A	PC	To provide professional and volunteer support for frail elders and their caregivers	\$100,000
Jewish Family Service Houston, TX	N/A	PC	To provide life skills training and supported employment opportunities to adults with disabilities, and family support	\$150,000

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Jewish Family Services Agency of Vancouver Vancouver, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide care management and comprehensive support services to elders and their families	\$75,000
John Burton Advocates for Youth San Francisco, CA	N/A	PC	To assist California's foster and homeless youth access education, housing, and health care	\$125,000
Jonas Philanthropies Inc. New York, NY	N/A	PC	To provide scholarships to doctoral-level nursing students pursuing veteran-focused healthcare careers	\$100,000
Juma Ventures San Francisco, CA	N/A	PC	To help foster youth gain job experience and prepare them for careers	\$100,000
Jumping Mouse Childrens Center Port Townsend, WA	N/A	PC	To provide therapy to at-risk children and support for their caregivers	\$50,000
Jumpstart For Young Children Inc. Los Angeles, CA	N/A	PC	To train older adult volunteers to help low-income preschoolers improve literacy/language skills	\$100,000
Just in Time for Foster Youth San Diego, CA	N/A	PC	To support foster youth to achieve self-sufficiency	\$60,000
Justice In Aging Oakland, CA	N/A	PC	To utilize training, policy innovation and litigation to inform and change systems affecting elders.	\$150,000
Kennesaw State University Research and Service Foundation Inc. Kennesaw, GA	N/A	SO I	To use solution-based journalism to advance child welfare reform in New Mexico	\$115,000
Kinderling Center Bellevue, WA	N/A	PC	To support the social and emotional development of infants and toddlers in foster care	\$40,000
L.A. Goal Culver City, CA	N/A	PC	To provide client-centered services and support for adults with developmental disabilities	\$40,000
Lanakila Pacific Honolulu, HI	N/A	PC	To provide services and activities for adults with disabilities to enhance employment opportunities, community inclusion, and overall quality of life	\$50,000
Larkin Street Youth Services San Francisco, CA	N/A	PC	To support homeless youth and youth at-risk of homelessness in San Francisco	\$150,000
Law College Association of the University of Arizona Tucson, AZ	N/A	PC	To provide pro bono legal services for veterans through veterans treatment court in Arizona	\$60,000
Law Foundation of Silicon Valley San Jose, CA	N/A	PC	To provide legal education and free civil legal services for transition-age foster youth	\$75,000
Legal Services For Children Inc San Francisco, CA	N/A	PC	To provide free legal representation and social work services to children and youth	\$125,000

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Legal Services for Seniors Seaside, CA	N/A	PC	To provide free legal counseling and representation for low-income elders	\$30,000
LIFE Eldercare Inc. Fremont, CA	N/A	PC	To provide supportive transportation to low-income elders with limited mobility	\$50,000
LifeMoves Menlo Park, CA	N/A	PC	To provide homelessness services to veterans and their families in Silicon Valley	\$100,000
Lighthouse for the Blind Inc. Seattle, WA	N/A	PC	To promote workplace advancement and full participation in the community for adults who are deaf-blind	\$40,000
Live Oak Adult Day Services San Jose, CA	N/A	PC	To provide adult day services, caregiver support and respite care to low-income families trying to prevent institutionalization of a loved one.	\$40,000
Los Angeles City College Foundation Los Angeles, CA	N/A	PC	To support current and former foster youth to enroll, persist, and graduate from college	\$30,000
Lost Chord Sheffield, United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To provide interactive music programs for elders with dementia	\$50,000
Lyford Cay Foundation Inc. New York, NY	N/A	PC	To prepare low-income Bahamian students for high school graduation and post-secondary or career technical education	\$100,000
Marbridge Foundation Inc. Manhaca, TX	N/A	PC	To provide adults with disabilities with training and education to achieve personal goals within a residential community setting	\$100,000
Marin Brain Injury Network Larkspur, CA	N/A	PC	To provide a continuum of care for individuals with acquired brain injuries and their families	\$40,000
Marin Humane Society Novato, CA	N/A	PC	To improve the health and quality of life of low-income seniors through pet care support	\$25,000
Meals on Wheels Diablo Region Walnut Creek, CA	N/A	PC	To provide meals, comprehensive fall prevention services, and care management to older adults	\$60,000
Military Child Education Coalition Harker Heights, TX	N/A	PC	To provide expertise and support to military children and their families through schools	\$150,000
Minor League Baseball Charities St. Petersburg, FL	N/A	SO I	To raise community awareness and inclusion, and help increase social and employment opportunities for adults with I/DD	\$75,000
Missoula Area Agency on Aging Missoula, MT	N/A	PC	To provide critical direct services to support elders to safely age in place	\$60,000
Mockingbird Society Seattle, WA	N/A	PC	To provide leadership development and advocacy training to foster and homeless youth	\$75,000

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Mountain Home Montana Inc. Missoula, MT	N/A	PC	To support young mothers and their children who are at risk of child welfare involvement	\$40,000
Mt. Carmel Veterans Service Center Colorado Springs, CO	N/A	PC	To support service members, veterans, and their families in the Colorado Springs community	\$100,000
My Possibilities Plano, TX	N/A	PC	To provide employment services and support to enable adults with I/DD to achieve their maximum potential and lead fulfilling lives in the community	\$75,000
Mychals Learning Place Hawthorne, CA	N/A	PC	To provide independent living skills and job training/placement for young adults with DD	\$50,000
Na Hoalooha-Maui Interfaith Volunteer Caregivers Wailuku, HI	N/A	PC	To provide trained volunteer support that enables homebound elders to live independently	\$60,000
National Ability Center Park City, UT	N/A	PC	To provide sports, recreation, and educational programs for adults, families, and friends affected by a disability	\$75,000
National Center for Youth Law Oakland, CA	N/A	PC	To support the educational success of Arizona's foster youth	\$100,000
National Coalition for Homeless Veterans Washington, DC	N/A	PC	2019 Membership Dues	\$1,000
National Sports Center for the Disabled Inc. Denver, CO	N/A	PC	To provide high quality accessible, adaptive outdoor sports and therapeutic recreation programs for adults with disabilities	\$40,000
National Veterans Legal Services Program Inc. Washington, DC	N/A	PC	To provide legal assistance to veterans seeking VA benefits and discharge upgrades	\$75,000
New Avenues for Youth Inc. Portland, OR	N/A	PC	To support youth who are experiencing or at risk of homelessness in Portland, OR	\$100,000
New Directions for People with Disabilities Inc. Santa Barbara, CA	N/A	PC	To provide educational and inclusive travel opportunities for adults with disabilities	\$50,000
New Directions Inc Los Angeles, CA	N/A	PC	To provide substance-abuse treatment, counseling, vocational education, and housing services to veterans and families	\$150,000
New Door Ventures San Francisco, CA	N/A	PC	To prepare youth for success in work and life through jobs, job training, and case management	\$125,000
New Mexico Child Advocacy Networks Albuquerque, NM	N/A	PC	To provide services to youth transitioning out of foster care	\$75,000
NextOp Inc. Houston, TX	N/A	PC	To provide employment support to transitioning veterans in the Gulf Coast region	\$50,000

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Noah Homes Inc. Spring Valley, CA	N/A	PC	To provide residential and support services for adults with developmental disabilities	\$35,000
North Coast Opportunities Inc Ukiah, CA	N/A	PC	To support renovations for Lake County's Community Action Agency and Disaster Recovery Center	\$60,000
Northern California Grantmakers San Francisco, CA	N/A	PC	2019 Membership Dues	\$14,250
Northwest Justice Project Seattle, WA	N/A	PC	To provide legal services to low-income veterans in Washington State	\$100,000
NPower Inc. Brooklyn, NY	N/A	PC	To provide information technology training and career support to veterans in Texas and California	\$100,000
Ombudsman Services of Contra Costa Inc. Pleasant Hill, CA	N/A	PC	To support advocacy for residents of long-term care facilities	\$75,000
Openhouse San Francisco, CA	N/A	PC	To provide inclusive housing and supportive services for LGBT elders to age safely in place.	\$125,000
Operation Homefront Inc. San Antonio, TX	N/A	PC	To provide stable transitional housing and support for wounded, ill, and injured veterans and their families	\$150,000
Opica Adult Day Program & Counseling Center Los Angeles, CA	N/A	PC	To provide day programs for elders with memory loss and dementia, and support services for caregivers	\$50,000
Our House of Portland Inc. Portland, OR	N/A	PC	To provide housing and supportive services to formerly homeless older adults living with HIV/AIDS	\$25,000
Outdoors For All Foundation Seattle, WA	N/A	PC	To enrich the quality of life for adults and transitioning youth with disabilities through outdoor recreation	\$50,000
Outward Bound Inc. LaGrangeville, NY	N/A	PC	To support veteran mental health and reintegration through outdoor education experiences	\$100,000
Pacific Assistance Dogs Society Burnaby, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To breed, train, place, and support certified service dogs to increase the independence of people living with disabilities	\$40,000
PEAK Grantmaking, Inc. Washington, DC	N/A	PC	2019 Membership Dues	\$3,266
Pike Market Senior Center Seattle, WA	N/A	PC	To offer food, housing placement and retention support, and social programs for older adults	\$45,000
Pivotal Connections San Jose, CA	N/A	PC	To support foster youth to graduate from high school, gain meaningful work experience, and enroll in post-secondary education	\$125,000

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Plan Institute for Citizenship & Disability Vancouver, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To empower families to plan and secure the future for their relative with a disability and to build supportive community connections	\$100,000
Power To Be Adventure Therapy Society Victoria, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide inclusive adaptive recreation programming for adults with disabilities	\$80,000
Project Avary Inc. San Rafael, CA	N/A	PC	To support the social-emotional development of youth with incarcerated parents	\$50,000
Rainbow Acres Camp Verde, AZ	N/A	PC	To provide a residential and therapeutic care community for adults with I/DD	\$50,000
Regents of the University of Michigan Ann Arbor, MI	N/A	PC	To support expansion of the Peer Advisors for Veterans Education in the Western U.S.	\$250,000
Respectability Rockville, MD	N/A	PC	To provide public education and advocate for full inclusion of people with disabilities	\$200,000
Returning Veterans Project Portland, OR	N/A	PC	To provide access to free, confidential therapeutic services for veterans and their families	\$30,000
RightWay Foundation Los Angeles, CA	N/A	PC	To provide employment and mental health support for foster youth	\$50,000
Rocky Boy Veterans Center Box Elder, MT	N/A	PC	To provide support for veterans on the Rocky Boy's Indian Reservation and surrounding area	\$50,000
Rocky Mountain Down Syndrome Association Inc. Denver, CO	N/A	PC	To provide continuing education opportunities for adults with Down syndrome	\$40,000
Ryther Seattle, WA	N/A	PC	To provide intensive mental health services to help children heal from past abuse or neglect	\$40,000
Safe & Sound San Francisco, CA	N/A	PC	To prevent child abuse and promote healthy and stable families	\$75,000
Saint Anne's Anglican Church Nassau, The Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To support social outreach activities to disadvantaged children and adults in Nassau, Bahamas	\$30,000
San Antonio Lighthouse for the Blind San Antonio, TX	N/A	PC	To provide school to work transition services and training for young adults with visual impairment and/or other disabilities	\$50,000
San Diego Grantmakers San Diego, CA	N/A	PC	To increase capacity of service providers to reduce veteran homelessness in the San Diego area	\$15,000
San Francisco Court Appointed Special Advocate Program San Francisco, CA	N/A	PC	To provide foster youth with trained volunteers who serve as advocates and mentors	\$50,000

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San Francisco Village San Francisco, CA	N/A	PC	To provide members opportunities to navigate programming and assistance to safely age in place.	\$50,000
Sanctuary of Hope Los Angeles, CA	N/A	PC	To provide comprehensive support services to transition-age youth in South Los Angeles	\$35,000
Senior Hub Inc. Northglenn, CO	N/A	PC	To reduce isolation, enhance independence and well-being, and promote volunteerism among older adults	\$65,000
Seniors' Resource Center Inc. Denver, CO	N/A	PC	To provide care management and comprehensive support services to elders and their families	\$50,000
Soar For Youth Berkeley, CA	N/A	PC	To support foster youth to graduate from high school and enroll in college	\$40,000
Southwest Autism Research and Resource Center Phoenix, AZ	N/A	PC	To provide vocational and life skills training and support for transitioning adults with autism spectrum disorder	\$100,000
Special Olympics Arizona Inc. Goodyear, AZ	N/A	PC	To provide inclusive sports and fitness opportunities for adults with and without intellectual disabilities in Arizona, Alaska, and Hawaii	\$180,000
Special Olympics Texas Inc. Pflugerville, TX	N/A	PC	To provide inclusive sports and fitness opportunities for adults with and without I/DD in Texas	\$70,000
Special Olympics Washington Seattle, WA	N/A	PC	To provide inclusive sports and recreation opportunities for adults with intellectual disabilities	\$75,000
Special Recreation Services Inc. Reno, NV	N/A	PC	To ensure that individuals with I/DD live quality lives, filled with meaningful relationships, skills, and opportunities to learn, work, and grow	\$30,000
St. Barnabas Senior Center of Los Angeles Los Angeles, CA	N/A	PC	To provide health and wellness programs for elders living with chronic diseases	\$100,000
St. Madeleine Sophie's Training Center El Cajon, CA	N/A	PC	To educate and empower adults with developmental disabilities to realize their full potential	\$75,000
Stagebridge Oakland, CA	N/A	PC	To engage seniors in performing arts and enrich quality of life in long-term care	\$40,000
Store To Door Portland, OR	N/A	PC	To provide volunteer-based grocery shopping and delivery, and friendly visits to homebound elders	\$35,000
Swords To Plowshares Veterans Rights Organization San Francisco, CA	N/A	PC	To provide legal services to homeless and low-income veterans throughout the Bay area	\$250,000

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Syracuse University Syracuse, NY	N/A	PC	To assist transitioning service members, veterans, and their spouses to make a rapid transition to new living wage careers after military service in Hawai'i	\$100,000
Taft College Foundation Taft, CA	N/A	PC	To support travel expenses for the 2020 Zero Project Conference	\$10,000
Taft College Foundation Taft, CA	N/A	PC	To provide a transition to independent living program for post-secondary students with intellectual and developmental disabilities	\$75,000
The Adoption Exchange Denver, CO	N/A	PC	To support the adoption of hard to place foster youth	\$75,000
The Arc of the United States Washington, DC	N/A	PC	To support future care planning for people with intellectual and developmental disabilities	\$400,000
The Arc of Ventura County Inc. Ventura, CA	N/A	PC	To provide competitive wage jobs for young adults with I/DD in local mid-size companies	\$100,000
The Canadian National Institute for the Blind Vancouver, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide post-vision loss career support for adults in British Columbia	\$50,000
The Chrysalis Center Los Angeles, CA	N/A	PC	To provide employment and job placement services to homeless and low-income veterans	\$50,000
The Eden Alternative Inc. Rochester, NY	N/A	PC	To foster culture change in long-term care facilities toward the adoption of person-directed care	\$125,000
The Mission Continues St. Louis, MO	N/A	PC	To promote veteran reintegration through voluntary community service	\$200,000
The National Military Family Association Inc. Alexandria, VA	N/A	PC	To support military spouse education and professional training opportunities	\$150,000
The Oasis Institute St. Louis, MO	N/A	PC	To engage elders in lifelong learning, community service, and physical activity programs	\$300,000
The Redwoods-A Community of Seniors Mill Valley, CA	N/A	PC	To provide in-patient hospice services in the Bay Area	\$250,000
The Redwoods-A Community of Seniors Mill Valley, CA	N/A	PC	To provide rental assistance to low-income seniors in independent and assisted living facilities	\$30,000
The Salvation Army - Bahamas Nassau, The Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To provide individualized instruction and skills training to students with visual impairments	\$35,000
The Society for the Relief of Disabled Children Pokfulam, Hong Kong	N/A	NC (Foreign Public Charity Equivalent)	To subsidize genetic testing for children with disabilities	\$50,000

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The Teen Project Inc. Sun Valley, CA	N/A	PC	To provide drug treatment, housing, and support to former foster youth and homeless youth	\$100,000
The UCLA Foundation Los Angeles, CA	N/A	PC	To prepare Los Angeles' foster youth to successfully apply to and enroll in college	\$75,000
The University Corporation San Francisco State San Francisco, CA	N/A	PC	To provide career planning and paid internships to SFSU's current and former foster youth	\$40,000
The University of Hong Kong Hong Kong	N/A	NC (Foreign Public Charity Equivalent)	To repair and maintain the Stanley Smith Swimming Pool	\$25,000
TimeSlips Creative Storytelling Inc. Milwaukee, WI	N/A	PC	To engage elders with memory loss and improve quality of life in long-term care settings	\$75,000
Treehouse Seattle, WA	N/A	PC	To support foster youth to graduate from high school	\$125,000
Twin Cities Public Television Inc. St. Paul, MN	N/A	PC	To support the provision of information and resources on healthy aging to older adults nationwide	\$100,000
United Friends of the Children Los Angeles, CA	N/A	PC	To provide education support and transitional housing for foster youth	\$100,000
United States Veterans Initiative Los Angeles, CA	N/A	PC	To provide transitional housing and supportive services to homeless women veterans	\$125,000
University of Delaware Newark, DE	N/A	PC	To provide leadership training and support for emerging nonprofit leaders of organizations serving adults with I/DD	\$150,000
University of Hawaii Foundation Honolulu, HI	N/A	PC	To provide scholarships for veteran nursing students in the University of Hawai'i system	\$55,000
University of Montana Foundation Missoula, MT	N/A	PC	To improve quality of life for people with disabilities in rural areas of Montana	\$100,000
University Of San Diego San Diego, CA	N/A	PC	To ensure the interests of foster youth are adequately addressed in court and in legislation	\$75,000
University of San Diego San Diego, CA	N/A	PC	To provide free legal services to veterans and advocate for veterans in GI Bill abuse cases	\$50,000
University of Southern California Los Angeles, CA	N/A	PC	To support the Los Angeles Veterans Collaborative	\$150,000
University of Victoria Victoria, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide customized technologies to improve the quality of life for adults with physical and developmental disabilities	\$100,000

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Urban Peak Denver Denver, CO	N/A	PC	To support Denver's homeless youth and youth at risk of homelessness	\$75,000
Utah Health & Human Rights Project Murray, UT	N/A	PC	To support the healing and well-being of unaccompanied refugee minors and their foster families	\$25,000
Vancouver Community College Foundation Vancouver, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide experiential vocational employment education and training for students with DD	\$50,000
Verde Valley Caregivers Coalition Sedona, AZ	N/A	PC	To help older adults maintain optimal independence and experience a better quality of life	\$75,000
Veterans Transition Network Vancouver, BC, Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide mental health care to assist Canadian veterans to reintegrate into their communities	\$75,000
Volunteer Interfaith Caregivers Southwest Bellaire, TX	N/A	PC	To organize community volunteers to provide free services and transportation to frail elders	\$30,000
Volunteers of America Inc. Sheridan, WY	N/A	PC	To provide services and housing to homeless veterans throughout Wyoming	\$40,000
VTC Enterprises Santa Maria, CA	N/A	PC	To provide life skills and employment training, placement/support for adults with disabilities	\$50,000
West Marin Senior Services Point Reyes Station, CA	N/A	PC	To provide care management and supportive services to help rural elders age in place	\$50,000
Working Wardrobes For A New Start Irvine, CA	N/A	PC	To provide supportive services and employment training to low-income veterans and their families in Orange County	\$75,000
Worklife Ministry Inc. Houston, TX	N/A	PC	To provide career transition and supportive services to veterans and their spouses	\$60,000
Workshops for Warriors Inc. San Diego, CA	N/A	PC	To provide vocational skills training and certification to transitioning veterans in San Diego	\$100,000
Yellowstone CASA Inc. Billings, MT	N/A	PC	To provide foster youth with trained volunteers to serve as advocates and mentors	\$30,000
YMCA of San Diego County San Diego, CA	N/A	PC	To support kinship caregivers in San Diego County	\$50,000
Youth Law Center San Francisco, CA	N/A	PC	To ensure children in foster care have the committed and skilled care that they need to thrive	\$95,000
Youth Policy Institute of Iowa Scarsdale, NY	N/A	PC	2019 Membership Dues	\$5,000

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Zen Hospice Project Inc. San Francisco, CA	N/A	PC	To provide education and training to caregivers on compassionate end of life care	\$75,000
Zero8hundred Inc. San Diego, CA	N/A	PC	To provide transition assistance, referrals, and support to service members and their families during the transition to civilian life in San Diego	\$100,000

Total ► **3a** **20,097,607****3b. Approved during the year for future payment**

Recipient Name and Address	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation Status of Recipient	Purpose of Grant or Contribution	Future Payment Amount
Abilities United Redwood City, CA	N/A	PC	To provide inclusive services and support for adults with disabilities	\$75,000
Affordable Living for the Aging West Hollywood, CA	N/A	PC	To provide low-income older adults with supportive housing and home-sharing facilitation	\$50,000
Alzheimers Family Services Center Huntington Beach, CA	N/A	PC	To provide adult day programming and caregiver services to families impacted by dementia related illnesses	\$75,000
Another Chance House Amarillo, TX	N/A	PC	To provide housing and supportive services to homeless veterans in the Texas panhandle	\$40,000
Arc California Sacramento, CA	N/A	PC	To advocate for and protect the rights of people with I/DD and support their full inclusion in the community	\$100,000
Assistance Dogs of the West Santa Fe, NM	N/A	PC	To support the Warrior Canine Connection program using veterans as trainers	\$70,000
Bay Area Outreach and Recreation Program Berkeley, CA	N/A	PC	To provide sports, recreation, & outdoor adventures to people with physical & visual disabilities	\$40,000
Becoming Independent Santa Rosa, CA	N/A	PC	To support people with I/DD through job training and community-based employment	\$75,000
Beyond Emancipation Oakland, CA	N/A	PC	To support Alameda County's foster youth to enroll and succeed in post-secondary programs	\$75,000
Big Brothers Big Sisters of San Diego County Inc. San Diego, CA	N/A	PC	To provide mentoring support for military children in the San Diego area	\$100,000

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Blue Star Recyclers Colorado Springs, CO	N/A	PC	To promote inclusive employment for young adults with autism and other disabilities in electronics recycling companies	\$100,000
Camp For All Foundation Houston, TX	N/A	PC	To provide a barrier-free camp experience for adults and transitioning youth with disabilities	\$50,000
Caregivers Volunteers Assisting the Elderly Ventura, CA	N/A	PC	To provide trained volunteer support to enable homebound elders to live independently	\$60,000
Central New Mexico Community College Foundation Inc. Albuquerque, NM	N/A	PC	To support the student Veterans Resource Center at Central New Mexico Community College	\$55,000
Channel Islands Young Men's Christian Association Santa Barbara, CA	N/A	PC	To provide case management and transitional housing to former foster and homeless youth	\$35,000
Child Bridge Inc. Bigfork, MT	N/A	PC	To recruit and support foster and adoptive families in Montana	\$40,000
Children's Rights Inc. New York, NY	N/A	PC	To ensure LGBTQ youth are safe and supported when in out-of-home care	\$100,000
Columbus Foundation Inc. Salt Lake City, UT	N/A	PC	To provide employment-related training and placement services for young adults with Autism Spectrum Disorder (ASD) and engage potential employers	\$55,000
Community Music Center San Francisco, CA	N/A	PC	To foster community engagement and lifelong learning for older adults through choir participation	\$60,000
Creative Growth Inc. Oakland, CA	N/A	PC	To provide expressive and professional artistic opportunities for adults with disabilities	\$50,000
Denver Indian Family Resource Center Denver, CO	N/A	PC	To support vulnerable Native American families and prevent child welfare involvement	\$50,000
Depaul UK London, United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To provide emergency and transitional housing and supportive services to disadvantaged youth in London	\$100,000
Disabled Sports USA Rockville, MD	N/A	PC	To encourage low-income young adults with disabilities to engage in sports	\$80,000
Eldergivers San Francisco, CA	N/A	PC	To support older adults in senior centers and long-term care facilities to create and share their art	\$20,000
Empact-Suicide Prevention Center Tempe, AZ	N/A	PC	To provide crisis response and navigation services to service members/veterans and their families in Maricopa County, Arizona	\$75,000

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Experience Matters Consortium Inc. Phoenix, AZ	N/A	PC	To leverage the skills and talents of adults age 50+ to build capacity of local nonprofits	\$60,000
Family Caregiver Alliance San Francisco, CA	N/A	PC	To provide comprehensive information, training, and support to family caregivers	\$75,000
Family Eldercare Inc. Austin, TX	N/A	PC	To help elders age in place through coordination of and connections to needed services	\$100,000
First Place for Youth Oakland, CA	N/A	PC	To provide housing and wraparound services to youth transitioning from foster care	\$125,000
Food For Thought Forestville, CA	N/A	PC	To provide nutritious, medically tailored meals and congregate lunches for low-income elders	\$50,000
Fosterclub Seaside, OR	N/A	PC	To support former foster youth to access and maintain health care coverage	\$125,000
Fostering Media Connections Los Angeles, CA	N/A	PC	To use solution-based journalism to advance child welfare reform	\$60,000
Foundation for Students Rising Above San Francisco, CA	N/A	PC	To support foster youth to graduate from college and succeed in the workforce	\$50,000
Friends of the Children - National Office Portland, OR	N/A	PC	To provide long-term one-on-one mentoring and support to at-risk youth and families	\$100,000
Friends of the Children Seattle Seattle, WA	N/A	PC	To provide long-term mentoring for at-risk children in King County, WA	\$65,000
Grantmakers In Aging Inc. Arlington, VA	N/A	PC	To support the field of philanthropy to address the transportation needs of older adults	\$30,000
Head Strong Project Inc. New York, NY	N/A	PC	To provide mental health care to post-9/11 veterans in the Western U.S.	\$150,000
Heart & Soul Salt Lake City, UT	N/A	PC	To improve quality of life for elders in long-term care through high quality live entertainment	\$50,000
Hearts & Minds Activity Center San Jose, CA	N/A	PC	To provide social day programs for elders with dementia and support for their family caregivers	\$52,000
Hire Heroes USA Alpharetta, GA	N/A	PC	To provide personalized career assistance to transitioning service members, veterans, and spouses	\$200,000
Home Front Military Network Colorado Springs, CO	N/A	PC	To provide a coordinated entry point to access services for military service members, veterans, and their families	\$50,000
Homeless Youth Alliance Inc. San Francisco, CA	N/A	PC	To provide supportive services to homeless youth in San Francisco	\$40,000

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Houston Community College Foundation Houston, TX	N/A	PC	To support independent living and workplace opportunities for college students with I/DD	\$50,000
Inclusion BC Society New Westminster, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To be the convener, conduit, and collective public voice for local Community Living member agencies serving people with disabilities across British Columbia	\$60,000
Institute On Aging San Francisco, CA	N/A	PC	To provide necessary supports and services to enable older adults to age in place	\$100,000
Jewish Family & Childrens Services San Francisco, CA	N/A	PC	To provide professional and volunteer support for frail elders and their caregivers	\$100,000
Jewish Family Service Houston, TX	N/A	PC	To provide life skills training and supported employment opportunities to adults with disabilities, and family support	\$150,000
Jewish Family Services Agency of Vancouver Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide care management and comprehensive support services to elders and their families	\$75,000
John Burton Advocates for Youth San Francisco, CA	N/A	PC	To assist California's foster and homeless youth access education, housing, and health care	\$125,000
Kinderling Center Bellevue, WA	N/A	PC	To support the social and emotional development of infants and toddlers in foster care	\$40,000
L.A. Goal Culver City, CA	N/A	PC	To provide client-centered services and support for adults with developmental disabilities	\$40,000
Law Foundation of Silicon Valley San Jose, CA	N/A	PC	To provide legal education and free civil legal services for transition-age foster youth	\$75,000
Legal Services For Children Inc San Francisco, CA	N/A	PC	To provide free legal representation and social work services to children and youth	\$125,000
Lighthouse for the Blind Inc. Seattle, WA	N/A	PC	To promote workplace advancement and full participation in the community for adults who are deaf-blind	\$40,000
Lyford Cay Foundation Inc. New York, NY	N/A	PC	To prepare low-income Bahamian students for high school graduation and post-secondary or career technical education	\$100,000
Marbridge Foundation Inc. Manchaca, TX	N/A	PC	To provide adults with disabilities with training and education to achieve personal goals within a residential community setting	\$100,000
Meals on Wheels Diablo Region Walnut Creek, CA	N/A	PC	To provide meals, comprehensive fall prevention services, and care management to older adults	\$60,000

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Military Child Education Coalition Harker Heights, TX	N/A	PC	To provide expertise and support to military children and their families through schools	\$150,000
Mockingbird Society Seattle, WA	N/A	PC	To provide leadership development and advocacy training to foster and homeless youth	\$75,000
My Possibilities Plano, TX	N/A	PC	To provide employment services and support to enable adults with I/DD to achieve their maximum potential and lead fulfilling lives in the community	\$75,000
National Veterans Legal Services Program Inc. Washington, DC	N/A	PC	To provide legal assistance to veterans seeking VA benefits and discharge upgrades	\$75,000
New Directions for People with Disabilities Inc. Santa Barbara, CA	N/A	PC	To provide educational and inclusive travel opportunities for adults with disabilities	\$50,000
New Directions Inc Los Angeles, CA	N/A	PC	To provide substance-abuse treatment, counseling, vocational education, and housing services to veterans and families	\$150,000
New Door Ventures San Francisco, CA	N/A	PC	To prepare youth for success in work and life through jobs, job training, and case management	\$125,000
NextOp Inc. Houston, TX	N/A	PC	To provide employment support to transitioning veterans in the Gulf Coast region	\$50,000
NPower Inc. Brooklyn, NY	N/A	PC	To provide information technology training and career support to veterans in Texas and California	\$100,000
Openhouse San Francisco, CA	N/A	PC	To provide inclusive housing and supportive services for LGBT elders to age safely in place.	\$125,000
Operation Homefront Inc. San Antonio, TX	N/A	PC	To provide stable transitional housing and support for wounded, ill, and injured veterans and their families	\$150,000
Outdoors For All Foundation Seattle, WA	N/A	PC	To enrich the quality of life for adults and transitioning youth with disabilities through outdoor recreation	\$50,000
Outward Bound Inc. LaGrangeville, NY	N/A	PC	To support veteran mental health and reintegration through outdoor education experiences	\$100,000
Pivotal Connections San Jose, CA	N/A	PC	To support foster youth to graduate from high school, gain meaningful work experience, and enroll in post-secondary education	\$125,000
Power To Be Adventure Therapy Society Victoria, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide inclusive adaptive recreation programming for adults with disabilities	\$80,000

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Rainbow Acres Camp Verde, AZ	N/A	PC	To provide a residential and therapeutic care community for adults with I/DD	\$50,000
Regents of the University of Michigan Ann Arbor, MI	N/A	PC	To support expansion of the Peer Advisors for Veterans Education in the Western U.S.	\$250,000
Respectability Rockville, MD	N/A	PC	To provide public education and advocate for full inclusion of people with disabilities	\$200,000
Returning Veterans Project Portland, OR	N/A	PC	To provide access to free, confidential therapeutic services for veterans and their families	\$30,000
Saint Anne's Anglican Church Nassau, The Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To support social outreach activities to disadvantaged children and adults in Nassau, Bahamas	\$30,000
San Antonio Lighthouse for the Blind San Antonio, TX	N/A	PC	To provide school to work transition services and training for young adults with visual impairment and/or other disabilities	\$50,000
San Francisco Village San Francisco, CA	N/A	PC	To provide members opportunities to navigate programming and assistance to safely age in place.	\$50,000
Sanctuary of Hope Los Angeles, CA	N/A	PC	To provide comprehensive support services to transition-age youth in South Los Angeles	\$35,000
Senior Hub Inc. Northglenn, CO	N/A	PC	To reduce isolation, enhance independence and well-being, and promote volunteerism among older adults	\$65,000
Seniors' Resource Center Inc. Denver, CO	N/A	PC	To provide care management and comprehensive support services to elders and their families	\$50,000
Soar For Youth Berkeley, CA	N/A	PC	To support foster youth to graduate from high school and enroll in college	\$40,000
Southwest Autism Research and Resource Center Phoenix, AZ	N/A	PC	To provide vocational and life skills training and support for transitioning adults with autism spectrum disorder	\$100,000
Special Olympics Arizona Inc. Goodyear, AZ	N/A	PC	To provide inclusive sports and fitness opportunities for adults with and without intellectual disabilities in Arizona, Alaska, and Hawaii	\$180,000
St. Barnabas Senior Center of Los Angeles Los Angeles, CA	N/A	PC	To provide health and wellness programs for elders living with chronic diseases	\$100,000
Store To Door Portland, OR	N/A	PC	To provide volunteer-based grocery shopping and delivery, and friendly visits to homebound elders	\$35,000

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Taft College Foundation Taft, CA	N/A	PC	To provide a transition to independent living program for post-secondary students with intellectual and developmental disabilities	\$75,000
The Arc of Ventura County Inc. Ventura, CA	N/A	PC	To provide competitive wage jobs for young adults with I/DD in local mid-size companies	\$100,000
The Salvation Army - Bahamas Nassau, The Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To provide individualized instruction and skills training to students with visual impairments	\$25,000
The Salvation Army - Bahamas Nassau, The Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To provide individualized instruction and skills training to students with visual impairments	\$10,000
The Society for the Relief of Disabled Children Pokfulam, Hong Kong	N/A	NC (Foreign Public Charity Equivalent)	To subsidize genetic testing for children with disabilities	\$50,000
The Teen Project Inc. Sun Valley, CA	N/A	PC	To provide drug treatment, housing, and support to former foster youth and homeless youth	\$100,000
The UCLA Foundation Los Angeles, CA	N/A	PC	To prepare Los Angeles' foster youth to successfully apply to and enroll in college	\$75,000
The University Corporation San Francisco State San Francisco, CA	N/A	PC	To provide career planning and paid internships to SFSU's current and former foster youth	\$40,000
Treehouse Seattle, WA	N/A	PC	To support foster youth to graduate from high school	\$125,000
United Friends of the Children Los Angeles, CA	N/A	PC	To provide education support and transitional housing for foster youth	\$100,000
United States Veterans Initiative Los Angeles, CA	N/A	PC	To provide transitional housing and supportive services to homeless women veterans	\$125,000
University of Delaware Newark, DE	N/A	PC	To provide leadership training and support for emerging nonprofit leaders of organizations serving adults with I/DD	\$150,000
University of Hawaii Foundation Honolulu, HI	N/A	PC	To provide scholarships for veteran nursing students in the University of Hawai'i system	\$55,000
University Of San Diego San Diego, CA	N/A	PC	To ensure the interests of foster youth are adequately addressed in court and in legislation	\$75,000
University of Southern California Los Angeles, CA	N/A	PC	To support the Los Angeles Veterans Collaborative	\$150,000
Vancouver Community College Foundation Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide experiential vocational employment education and training for students with DD	\$50,000

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Verde Valley Caregivers Coalition Sedona, AZ	N/A	PC	To help older adults maintain optimal independence and experience a better quality of life	\$75,000
Veterans Transition Network Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide mental health care to assist Canadian veterans to reintegrate into their communities	\$75,000
Volunteer Interfaith Caregivers Southwest Bellaire, TX	N/A	PC	To organize community volunteers to provide free services and transportation to frail elders	\$30,000
Volunteers of America Inc. Sheridan, WY	N/A	PC	To provide services and housing to homeless veterans throughout Wyoming	\$40,000
West Marin Senior Services Point Reyes Station, CA	N/A	PC	To provide care management and supportive services to help rural elders age in place	\$50,000
Working Wardrobes For A New Start Irvine, CA	N/A	PC	To provide supportive services and employment training to low-income veterans and their families in Orange County	\$75,000
Workshops for Warriors Inc. San Diego, CA	N/A	PC	To provide vocational skills training and certification to transitioning veterans in San Diego	\$100,000
YMCA of San Diego County San Diego, CA	N/A	PC	To support kinship caregivers in San Diego County	\$50,000
Zen Hospice Project Inc. San Francisco, CA	N/A	PC	To provide education and training to caregivers on compassionate end of life care	\$75,000

Total \$8,872,000

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INFORMATION WITH RESPECT TO EXPENDITURE RESPONSIBILITY GRANTS

Grantee:

May Wong Smith Trust
c/o School of Economics and Finance
University of Saint Andrews
Castlecliffe
Saint Andrews Fife KY16 9AJ Scotland

Payments:

\$300,000 paid on 11/4/2011

\$300,000 Total

Purpose:

To establish a permanent endowment fund to further the mission of the May Wong Smith Trust: establishing and maintaining St. Leonard's College as part of the University of St. Andrews, and providing fellowships, scholarships, and prizes to students in the University of St. Andrews, assisting such students financially and generally looking after their welfare.

Amount of Grant Spent by Grantee:

\$15,424

Date of Report Received from Grantee:

11/26/2019 Annual ER Report

Diversion:

To the knowledge of the foundation, and based on the information furnished by the grantee, no part has been used for other than its intended purpose.

Verification:

The foundation reviewed the Grant Report of 11/26/2019 but did not undertake any verification of the grantee's report as there has not been any reason to doubt its accuracy or reliability (Reg. 53.4945-5(c)).