# Form **990-PF**

#### **Return of Private Foundation**

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

▶ Do not enter social security numbers on this form as it may be made public.
 ▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047 **2021**Open to Public Inspection

Department of the Treasury Internal Revenue Service

For calendar year 2021 or tax year beginning , and ending Name of foundation A Employer identification number \*\*-\*\*\*2075 MAY AND STANLEY SMITH CHARITABLE TRUST Number and street (or P.O. box number if mail is not delivered to street address) Room/suite **B** Telephone number 309 770 TAMALPAIS DRIVE 415-332-0166 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here CORTE MADERA, CA 94925 **D** 1. Foreign organizations, check here **G** Check all that apply: Initial return Initial return of a former public charity Final return Amended return 2. Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation **H** Check type of organization: E If private foundation status was terminated Other taxable private foundation under section 507(b)(1)(A), check here X Accrual I Fair market value of all assets at end of year | J Accounting method: F If the foundation is in a 60-month termination (from Part II, col. (c), line 16) Other (specify) under section 507(b)(1)(B), check here ... 511, 123, 367. (Part I, column (d), must be on cash basis.) ▶\$ Part I Analysis of Revenue and Expenses (d) Disbursements (c) Adjusted net (a) Revenue and (b) Net investment (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).) for charitable purposes (cash basis only) expenses per books income income N/A Contributions, gifts, grants, etc., received ...... Check X if the foundation is not required to attach Sch. B Interest on savings and temporary cash investments 9,137,092. 10,625,409. STATEMENT 4 Dividends and interest from securities 5a Gross rents **b** Net rental income or (loss) 52,450,691 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a ..... 52,450,691. 7 Capital gain net income (from Part IV, line 2) 0. 8 Net short-term capital gain Income modifications Gross sales less returns and allowances **b** Less: Cost of goods sold ... c Gross profit or (loss) -314,388. -993,998. STATEMENT 2 11 Other income 8,143,094. 62,761,712. Total. Add lines 1 through 11 710,615. 522,672. 13 Compensation of officers, directors, trustees, etc. 857,927. 947,801. 14 Other employee salaries and wages ..... 399,174 160,717. 15 Pension plans, employee benefits 16a Legal fees STMT 3 19,818. 2,919. Expenses b Accounting fees STMT 4 118,636. 56,641. 97,471. 2,635,295 c Other professional fees STMT 5 17 Interest ..... Taxes STMT 6 1,153,643. 352. 18 Depreciation and depletion 207,729. 208,006 20 Occupancy 10,248. 10,234. 21 Travel, conferences, and meetings ..... 22 Printing and publications ...... 23 Other expenses STMT 7 8,298,704. 93,410. Operating 24 Total operating and administrative 14,412,066 2,099,946. expenses. Add lines 13 through 23 24,189,378. 23,813,878. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 38,601,444 N/A 25,913,824. Add lines 24 and 25 27 Subtract line 26 from line 12: 24,160,268. **a** Excess of revenue over expenses and disbursements 8,143,094 **b Net investment income** (if negative, enter -0-) N/A C Adjusted net income (if negative, enter -0-)

123501 12-10-21 LHA For Paperwork Reduction Act Notice, see instructions.

D	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	
F	ai t	column should be for end-of-year amounts only.	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	35,267,833.	21,529,190.	21,529,190.
	3	Accounts receivable 11,127,898.			
		Less: allowance for doubtful accounts	485,654.	11,127,898.	11,127,898.
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts			
	5	Grants receivable			
		Receivables due from officers, directors, trustees, and other			
	_	disqualified persons			
	7	Other notes and loans receivable			
		Less: allowance for doubtful accounts			
S	8	Inventories for sale or use	6,322.	6,001.	6,001.
Assets		Prepaid expenses and deferred charges	97,859.	47,067.	47,067.
As		Investments - U.S. and state government obligations	,	,	,
		Investments - corporate stock STMT 9	270,638,020.	322,083,035.	322,083,035.
	c	Investments - corporate bonds STMT 10	93,509,001.	82,026,503.	322,083,035. 82,026,503.
	11	Investments - land, buildings, and equipment: basis			
		Less: accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 11	90,123,085.	74,303,673.	74,303,673.
	14	Land, buildings, and equipment: basis			
		Less: accumulated depreciation			
	15	Other assets (describe )			
		Total assets (to be completed by all filers - see the			
		instructions. Also, see page 1, item I)	490,127,774.	511,123,367.	511,123,367.
	17	Accounts payable and accrued expenses	907,720.	1,188,668.	
		Grants payable	10,200,000.	10,575,500.	
S		Deferred revenue			
Liabilities	20				
iabi	21	Mortgages and other notes payable			
	22	Other liabilities (describe )			
_	23		11,107,720.	11,764,168.	
		Foundations that follow FASB ASC 958, check here			
ces		and complete lines 24, 25, 29, and 30.			
anc	24	Net assets without donor restrictions			
Bal	25	***************************************			
Fund Balan		Foundations that do not follow FASB ASC 958, check here			
		and complete lines 26 through 30.	001 226 001	201 226 001	
s or		Capital stock, trust principal, or current funds	201,336,001.	201,336,001.	
set	27	Paid-in or capital surplus, or land, bldg., and equipment fund	277,684,053.	0. 298,023,198.	
As	28	Retained earnings, accumulated income, endowment, or other funds	479,020,054.	499,359,199.	
Net Assets	29	Total net assets or fund balances	4/9,020,034.	433,333,133.	
	30	Total liabilities and net assets/fund balances	490,127,774.	511,123,367.	
=				311,123,307	
P	<u>art</u>	Analysis of Changes in Net Assets or Fund B	alances		
1	Tota	net assets or fund balances at beginning of year - Part II, column (a), line	29		
	(mus	st agree with end-of-year figure reported on prior year's return)		1	479,020,054.
2 Enter amount from Part I, line 27a					24,160,268.
3	Othe	r increases not included in line 2 (itemize)		3	0.
4	Add	lines 1, 2, and 3			503,180,322.
		eases not included in line 2 (itemize)		ATEMENT 8 5	3,821,123.
6	Tota	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 29	6	499,359,199.
					Form <b>990-PF</b> (2021)

Part IV Capital Gains	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 ac P - Purc D - Dona	cquired ( hase ation	<b>c)</b> Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a								
b								
С								
d								
е								
(e) Gross sales price	(e) Gross sales price  (f) Depreciation allowed (g) Cost or other basis plus expense of sale			ı	<b>(h)</b> Gain or (los ((e) plus (f) minus			
<u>a</u>								
b								
d								
<u>e</u>			10 (0.4	1 /00				
Complete only for assets snowin	ng gain in column (h) and owned by				_	(I) (	Gains (Col. (h) gai k), but not less th	n minus
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Exce over co	ess of cool. (j), if			COI. (	Losses (from col.	(h))
<u>a</u>								
<u>b</u>								
d								
_ е						1		
2 Capital gain net income or (net ca	apital loss) $ \begin{cases} & \text{If gain, also enter} \\ & \text{If (loss), enter -0} \end{cases} $	r in Part I, line 7 - in Part I, line 7			} 2			
3 Net short-term capital gain or (los	ss) as defined in sections 1222(5) ar	nd (6):						
	column (c). See instructions. If (loss				$\downarrow$			
Part I, line 8		(01:	40.46		J 3	4040		•
	sed on Investment Incon			• • •	• • •		see instruct	ions)
	described in section 4940(d)(2), che					1		205 724
Date of ruling or determination		tach copy of lett		-	see instru	ctions)	1	325,724.
	enter 1.39% (0.0139) of line 27b. Ex							
enter 4% (0.04) of Part I, line 1	2, col. (b)					J		
	tic section 4947(a)(1) trusts and tax	able foundations	only; o	thers, ent	er -0-)		2	0.
							3	325,724.
	etic section 4947(a)(1) trusts and tax						4	0.
	ome. Subtract line 4 from line 3. If ze	ro or less, enter	-0				5	325,724.
6 Credits/Payments:				ı	0.5	- 064		
a 2021 estimated tax payments and 2020 overpayment credited to 2021 6a 265,064					<u>.</u>			
b Exempt foreign organizations - tax withheld at source 6b				0.	4			
c Tax paid with application for extension of time to file (Form 8868) 6c 200,0								
d Backup withholding erroneously withheld 6d 0.						165 06:		
7 Total credits and payments. Ad	ld lines 6a through 6d						7	465,064.
	ment of estimated tax. Check here		20 is at	ttached <sub>.</sub>			8	0.
9 Tax due. If the total of lines 5 and 8 is more than 7, enter amount owed					$\vdash$	420 242		
• •	than the total of lines 5 and 8, enter						10	139,340.
11 Enter the amount of line 10 to b	be: Credited to 2022 estimated tax	<b>&gt;</b>		139,	340. F	Refunded►	11	0.

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ГС	alt Al-W	Statements negariting Activities			
16	a During the	tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in		Yes	No
	any politica	al campaign?	1a		X
ŀ		d more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	If the answ	er 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.			
(	Did the fou	ndation file Form 1120-POL for this year?	1c		X
		mount (if any) of tax on political expenditures (section 4955) imposed during the year:			
	(1) On the	foundation. $\blacktriangleright$ \$ (2) On foundation managers. $\blacktriangleright$ \$			
(		eimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			
	managers.	<b>▶</b> \$ 0.			
2	Has the for	undation engaged in any activities that have not previously been reported to the IRS?	2		X
	If "Yes," att	ach a detailed description of the activities.			
3	Has the for	undation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or			
		other similar instruments? If "Yes," attach a conformed copy of the changes	3		Х
4;		ndation have unrelated business gross income of \$1,000 or more during the year?	4a	Х	
		s it filed a tax return on Form 990-T for this year?	4b	Х	
5	Was there	a liquidation, termination, dissolution, or substantial contraction during the year?	5		Х
		ach the statement required by General Instruction T.			
6		uirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
		age in the governing instrument, or			
		legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law			
		he governing instrument?	6	Х	
7	Did the fou	ndation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV	7	Х	
8	a Enter the s	tates to which the foundation reports or with which it is registered. See instructions.			
	CA				
ı	If the answ	er is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)			
	of each sta	te as required by General Instruction G? If "No," attach explanation	8b	Х	
9		dation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar			
		or the tax year beginning in 2021? See the instructions for Part XIII. If "Yes," complete Part XIII	9		Х
10		rsons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		Х
		e during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
	-	2(b)(13)? If "Yes," attach schedule. See instructions	11		Х
12		ndation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
		ach statement. See instructions	12		Х
13	Did the fou	ndation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
		Idress WWW.SMITHCT.ORG			
14	The books	are in care of ► MAY & STANLEY SMITH CHARITABLE TR Telephone no. ► 415-33	2-0	166	
		▶770 TAMALPAIS DRIVE SUITE 309, CORTE MADERA, CA ZIP+4 ▶94			
15		47(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041 -</b> check here		<b></b>	
		he amount of tax-exempt interest received or accrued during the year	N	/A	
16		e during calendar year 2021, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
		or other financial account in a foreign country?	16		X
		structions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	-		
	foreign cou				

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Form **990-PF** (2021)

Form 990-PF (2021) MAY AND STANLEY SMITH CHARITABLE TRUST **-**  Part VI-B   Statements Regarding Activities for Which Form 4720 May Be Required	<u>*2075</u>		Page 5
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?	1a(1)		Х
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
a disqualified person?	1a(2)		Х
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?		Х	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	4 (4)		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?			
(6) Agree to pay money or property to a government official? (Exception. Check "No"	1a(5)		Х
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.)	1a(6)		Х
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		Х
c Organizations relying on a current notice regarding disaster assistance, check here			
d 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 2021?	1d		Х
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 2021, did the foundation have any undistributed income (Part XII, lines			
6d and 6e) for tax year(s) beginning before 2021?	2a		X
If "Yes," list the years <b>&gt;</b>			
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach			
statement - see instructions.) N/A	2b		
c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.			
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	0.0		X
during the year?	3a		
<b>b</b> If "Yes," did it have excess business holdings in 2021 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 2021.)  N/A	3b		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		Х
<b>b</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 2021?	4b		Х

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

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<b>5a</b> During the year, did the foundation pay or incur any amount to:					res	NO
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?						Х
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly,						
any voter registration drive?						Х
(3) Provide a grant to an individual for travel, study, or other similar purposes?						Х
(4) Provide a grant to an organization other than a charitable, etc., organizatio						
4945(d)(4)(A)? See instructions				5a(4)	Х	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for						
the prevention of cruelty to children or animals?				5a(5)		Х
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did <b>any</b> of the transactions fail to qualify under the exceptions described in Regulations						
section 53.4945 or in a current notice regarding disaster assistance? See instr				5b	Х	
c Organizations relying on a current notice regarding disaster assistance, check	here					
<b>d</b> 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? SEE STATEMENT 12						
If "Yes," attach the statement required by Regulations section 53.4945-5(d).						
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to	pav premiums on					
a personal benefit contract?				6a		Х
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?			6b		Х
If "Yes" to 6b, file Form 8870.						
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax s	shelter transaction?			7a		Х
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attribu				7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$						
				8		х
Part VII Information About Officers, Directors, Trust	ees Foundation Ma	nagers, Highly	<i>,</i>			
Paid Employees, and Contractors			•			
List all officers, directors, trustees, and foundation managers and t	heir compensation.					
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plan and deferred	T	( <b>e)</b> Exp	ense
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	s ac	ccount, allowai	, other nces
RUTH M. COLLINS	TRUSTEE/CONSU	,	compensation	+	u	
770 TAMALPAIS DRIVE SUITE 309	,					
CORTE MADERA, CA 94925	12.00	128,596.	0			0.
DAVID C CUNEO	TRUSTEE	220,000		+-		
770 TAMALPAIS DRIVE SUITE 309						
CORTE MADERA, CA 94925	10.00	125,000.	0			0.
DANIEL F. PIOMBO	TRUSTEE	12370001		┿		
770 TAMALPAIS DRIVE SUITE 309	11100122					
CORTE MADERA, CA 94925	10.00	125,000.	0			0.
VILLIAM SMITH	CEO	123,000.	•	╫		
770 TAMALPAIS DRIVE SUITE 309	C 10					
CORTE MADERA, CA 94925	40.00	332,019.	30,039			0.
2 Compensation of five highest-paid employees (other than those inc			30,033	•		<u> </u>
			(d) Contributions to	1	<b>e)</b> Exp	ense
(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 plan and deferred compensation	s að	count, allowai	ense , other
AMY FREEMAN - 770 TAMALPAIS DRIVE	DIRECTOR OF P	DOCD VMC	compensation	$+\!-$	alluwai	11065
SUITE 309, CORTE MADERA, CA 94925	40.00	188,605.	40,887			0.
ELISABETH CUTLER - 770 TAMALPAIS	SENIOR PROGRA			┿		<u> </u>
DRIVE SUITE 309, CORTE MADERA, CA	40.00	153,779.	29,088			0.
VILLIAM LOCKWOOD - 770 TAMALPAIS	SENIOR PROGRA			┿		<u> </u>
DRIVE SUITE 309, CORTE MADERA, CA	SENIOR PROGRA 40.00	154,966.	18,933			0.
DANIEL GAFF - 770 TAMALPAIS DRIVE		RANTS MGM		+		<u> </u>
SUITE 309, CORTE MADERA, CA 94925	1 40.00	144,074.				0.
KELLY KENT - 770 TAMALPAIS DRIVE			26,409	+		<u> </u>
	SENIOR PROGRA					Λ
SUITE 309, CORTE MADERA, CA 94925	40.00	143,432.	26,954	•		0.
Total number of other employees paid over \$50,000			<u></u>		<u> </u>	
			For	m <b>99(</b>	)-PF	(2021)

Part VII	rs, Trustees, Founda ontinued)	tion Managers, H	ighly	
3 Five highest-paid independent contractors for profession		r "NONE."		
(a) Name and address of each person paid more the	nan \$50,000	<b>(b)</b> Type (	of service	(c) Compensation
RELEVANT WEALTH ADVISORS - 2 BEI	LVEDERE PLACE,			
SUITE 350, MILL VALLEY, CA 9494	1	INVESTMENT	MANAGER	2,544,176.
		_		
				1
				• 0
Total number of others receiving over \$50,000 for professional service Part VIII-A   Summary of Direct Charitable Acti	vities		<b>&gt;</b>	<u> </u>
List the foundation's four largest direct charitable activities during the number of organizations and other beneficiaries served, conferences c			ne	Expenses
1 N/A				
2				
3				
4				
Part VIII-R   Summon of Program Deleted Inve	otmonto			
Part VIII-B Summary of Program-Related Inventorible the two largest program-related investments made by the four		lines 1 and 2.		Amount
1 N/A				
2				
All other program-related investments. See instructions.				
3				
Total. Add lines 1 through 3			<b>•</b>	0.

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P	art IX Minimum Investment Return (All domestic foundations must comple	ete this part. Foreign four	ndations	, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purpo	oses:		
а	Average monthly fair market value of securities		1a	393,743,753.
	Average of monthly cash balances		1b	28,561,522.
	Fair market value of all other assets (see instructions)		1c	83,332,314.
	Total (add lines 1a, b, and c)		1d	505,637,589.
е	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	505,637,589.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see in	structions)	4	7,584,564.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3		5	498,053,025.
6	Minimum investment return. Enter 5% (0.05) of line 5		6	24,902,651.
P	art X Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) privation foreign organizations, check here   and do not complete this part.)	ate operating foundations an	d certain	
_			1	24,902,651.
1	Minimum investment return from Part IX, line 6		-	24,302,031.
	Tax on investment income for 2021 from Part V, line 5	117,997.		
b		111,331.	2c	443,721.
3	Add lines 2a and 2b		3	24,458,930.
-	Distributable amount before adjustments. Subtract line 2c from line 1		4	24,430,930.
4	Recoveries of amounts treated as qualifying distributions		5	24,458,930.
5 6	Add lines 3 and 4		6	24,430,930.
7	Deduction from distributable amount (see instructions)  Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1		7	24,458,930.
<u>'</u>			/	24,430,330.
P	art XI Qualifying Distributions (see instructions)			
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26		1a	25,913,824.
b	<b>b</b> Program-related investments - total from Part VIII-B			0.
2				
3	Amounts set aside for specific charitable projects that satisfy the:			
а	Suitability test (prior IRS approval required)	3a		
b	<b>a</b>		3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4		4	25,913,824.
				Form <b>990-PF</b> (2021)

MAY AND STANLEY SMITH CHARITABLE TRUST

123571 12-10-21

# Part XII Undistributed Income (see instructions)

	<b>(a)</b> Corpus	( <b>b)</b> Years prior to 2020	(c) 2020	<b>(d)</b> 2021
Distributable amount for 2021 from Part X, line 7				24,458,930.
2 Undistributed income, if any, as of the end of 2021:			12 500 561	
a Enter amount for 2020 only			13,782,561.	
<b>b</b> Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2021:				
<b>a</b> From 2016				
<b>b</b> From 2017				
<b>c</b> From 2018				
<b>d</b> From 2019				
e From 2020				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2021 from				
Part XI, line 4: $\triangleright$ \$ 25,913,824.				
<b>a</b> Applied to 2020, but not more than line 2a			13,782,561.	
<b>b</b> Applied to undistributed income of prior		•		
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	0			
(Election required - see instructions)	0.			10 101 000
d Applied to 2021 distributable amount	0			12,131,263.
e Remaining amount distributed out of corpus	0.			
Excess distributions carryover applied to 2021 (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:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
<b>b</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		0.		
assessed		0.		
d Subtract line 6c from line 6b. Taxable		0.		
amount - see instructions  e Undistributed income for 2020. Subtract line		0.		
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2021. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2022				12,327,667.
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 2016				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2022.				
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2017				
<b>b</b> Excess from 2018				
c Excess from 2019				
d Excess from 2020				
e Excess from 2021				

Part XIII Private Operating F	oundations (see in:	structions and Part VI-	A, question 9)	N/A	
1 a If the foundation has received a ruling of	or determination letter that	t it is a private operating			
foundation, and the ruling is effective fo	or 2021, enter the date of	the ruling			
<b>b</b> Check box to indicate whether the foun				4942(j)(3) or 49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years	77. 7	
income from Part I or the minimum	(a) 2021	<b>(b)</b> 2020	(c) 2019	(d) 2018	(e) Total
investment return from Part IX for					
each year listed					
<b>b</b> 85% (0.85) of line 2a					
c Qualifying distributions from Part XI,					
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:					
<ul><li>a "Assets" alternative test - enter:</li><li>(1) Value of all assets</li></ul>					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return					
shown in Part IX, 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 XIV   Supplementary Info	rmation (Comple	te this part only	if the foundation	n had \$5,000 or m	ore in assets
at any time during	the year-see instr	ructions.)		•	
1 Information Regarding Foundation	on Managers:				
a List any managers of the foundation wh	-	than 2% of the total cont	ributions received by the	e foundation before the clo	se of anv tax
year (but only if they have contributed i			,		,
NONE					
<b>b</b> List any managers of the foundation when	no own 10% or more of th	e stock of a corporation (	or an equally large porti	on of the ownership of a p	artnership or
other entity) of which the foundation ha			, , , , , ,	,	•
NONE					
2 Information Regarding Contribut	ion. Grant. Gift. Loan	. Scholarship, etc., Pr	rograms:		
			-	not accept unsolicited requ	ests for funds. If
the foundation makes gifts, grants, etc.					
a The name, address, and telephone num	ber or email address of th	ne person to whom applic	cations should be addres	ssed:	
ODD ODD COLORS 12					
SEE STATEMENT 13					
<b>b</b> The form in which applications should	oe submitted and informa	tion and materials they sh	nould include:		
c Any submission deadlines:					
<b>d</b> Any restrictions or limitations on award	s, such as by geographica	al areas, charitable fields,	kinds of institutions, or	other factors:	

Part XIV Supplementary Information	on (continued)			
3 Grants and Contributions Paid During the		Payment	<u> </u>	
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
GRANTS APPROVED IN 2021,	N/A	PUBLIC	GENERAL	
PAYABLE IN				
FUTURE YEARS, CA 94925				10,575,500.
GRANTS APPROVED IN PRIOR YEARS,	N/A	PUBLIC	GENERAL	
PAID IN 2021				
(INCLUDED ABOVE), CA 94925				-10,200,000
VARIOUS ORGANIZATIONS	N/A	PUBLIC	GENERAL	
SEE ATTACHED				
DETAILS, CA 94925				23,813,878.
Total			▶ 3a	24,189,378.
<b>b</b> Approved for future payment				
VARIOUS ORGANIZATIONS	N/A	PUBLIC	GENERAL	
SEE ATTACHED				9 660 500
DETAILS, CA 94925				9,660,500
Total			<b>&gt;</b> 3b	9,660,500
TO CO.				orm <b>990-PF</b> (2021)

# Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income			ded by section 512, 513, or 514	(e)		
g g.	(a)	(b)	(C) Exclu-	(d)	Related or exempt		
1 Program service revenue:	Business code	Amount	sion code	Amount	function income		
a							
b							
d							
e							
f							
g Fees and contracts from government agencies							
2 Membership dues and assessments							
3 Interest on savings and temporary cash investments							
4 Dividends and interest from securities			14	10,625,409.			
5 Net rental income or (loss) from real estate:							
a Debt-financed property							
<b>b</b> Not debt-financed property							
6 Net rental income or (loss) from personal							
property							
7 Other investment income			01	-314,388.			
8 Gain or (loss) from sales of assets other than inventory			18	52,450,691.			
9 Net income or (loss) from special events							
10 Gross profit or (loss) from sales of inventory							
11 Other revenue:							
a							
b							
d							
e							
12 Subtotal. Add columns (b), (d), and (e)		0.		62,761,712.	0.		
13 Total. Add line 12, columns (b), (d), and (e)				13	62,761,712.		
(See worksheet in line 13 instructions to verify calculations.)							

## Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Tille No.	the foundation's exempt purposes (other than by providing funds for such purposes).

	,										
Part XVI	Informa	ation R	egardir	ng Trans	sfers to a	nd Trans	actions a	nd Relation	nships With	Noncharit	able
	Exemp	t Orgai	nizatior	าร							
											,

1	Did the d	organization directly or indir	rectly engage in any o	of the followin	g with any other organization	on described in secti	on 501(c)		Yes	No
(other than section 501(c)(3) organizations) or in section 527, relating to political organizations?										
а	Transfer	rs from the reporting founda	ation to a noncharital	ble exempt or	ganization of:					
	(1) Cas	sh						1a(1)		X
	(2) Oth	er assets						1a(2)		X
b	Other tra	ansactions:								
	(1) Sale	es of assets to a noncharital	ble exempt organizat	ion				1b(1)		X
		chases of assets from a no						1b(2)		X
		ntal of facilities, equipment,						1b(3)		X
	<b>(4)</b> Reir	mbursement arrangements						1b(4)		X
	<b>(5)</b> Loa	ins or loan guarantees						1b(5)		X
		formance of services or me						1b(6)		X
		of facilities, equipment, ma						1c		X
d		swer to any of the above is		-	• •	-			ets,	
		ces given by the reporting fo			ed less than fair market valu	ue in any transaction	or sharing arrangement, sh	now in		
, ,		(d) the value of the goods,				1 (0				
<b>(a)</b> ∟i	ne no.	( <b>b</b> ) Amount involved	(c) Name of		e exempt organization	(d) Description	of transfers, transactions, and s	haring an	angeme	nts
				N/A						
2a	Is the fo	undation directly or indirect	tly affiliated with, or r	elated to, one	or more tax-exempt organi	izations described				
		on 501(c) (other than section	-					Yes	X	No
b		complete the following sche								
		(a) Name of org			(b) Type of organization		(c) Description of relationsh	ip		
		er penalties of perjury, I declare					best of my knowledge	the IDS	liecues :	hie
Sig	and and	belief, it is true, correct, and con	mplete. Declaration of pre	eparer (other that	n taxpayer) is based on all inforn	nation of which preparer	has any knowledge.	the IRS on with the n with the n below	e prepar	er
Нè	re	•			1	TRUSTE		Yes		No
	Sig	gnature of officer or trustee	<u> </u>		Date	Title	<u> </u>	103		J 140
		Print/Type preparer's na		Preparer's s		Date	Check   if PTIN			
				'	-		self- employed			
Pa	id	DAVID C. C	UNEO					394	891	
	 eparer			ORRTS	ACCOUNTANTS	<u>                                       </u>	Firm's EIN ▶ **-**			
	e Only		LOINT & M	.0111110,	110000IIIIIII	•	I IIIII S LIIV	55	<i>3</i>	
	)	·	O CALTEOR	NTA ST	. 3RD FLOOR		+			
		· ·	N FRANCIS				Phone no. (415)	981	-87	66
		ı DA	T. TIMETO	CO, CA	. , , , , , , , , , , , , , , , , , , ,			rm <b>99</b> 0		
							10		, , ,	120211

# Underpayment of Estimated Tax by Corporations

Attach to the corporation's tax return.

FORM 990-PF

Department of the Treasury Internal Revenue Service

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

OMB No. 1545-0123

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	rotan	i, but do not attacin	om zzzo.			
_	Total toy (see instructions)						325,724.
'	Total tax (see instructions)					1	323,724.
2 8	Personal holding company tax (Schedule PH (Form 1120), lin	e 26)	included on line 1	2a			
	Look-back interest included on line 1 under section 460(b)(2)					-	
	contracts or section 167(g) for depreciation under the income			2b			
	ι,						
(	Credit for federal tax paid on fuels (see instructions)			2c			
(	l Total. Add lines 2a through 2c					2d	
3	Subtract line 2d from line 1. If the result is less than \$500, $\ensuremath{\text{do}}$	not c	omplete or file this form.	The corporation			
	does not owe the penalty					3	325,724.
4	Enter the tax shown on the corporation's 2020 income tax ret						
	or the tax year was for less than 12 months, skip this line and	enter	the amount from line 3	on line 5		4	318,584.
5	Required annual payment. Enter the smaller of line 3 or line					_	210 E04
	enter the amount from line 3	tho	t apply. If any bayon are	chacked the corneration	must file Form 0	5	318,584.
	even if it does not owe a penalty. See instructions.	)W liid	t apply. If any boxes are	checked, the corporation	IIIust ille Fortit Za	220	
6	The corporation is using the adjusted seasonal installing	ment	method.				
7	X The corporation is using the annualized income instal						
8	The corporation is a "large corporation" figuring its first			on the prior year's tax.			
F	Part III   Figuring the Underpayment			·			
	•		(a)	(b)	(c)		(d)
9	Installment due dates. Enter in columns (a) through (d) the	П					
	15th day of the 4th (Form 990-PF filers: Use 5th month),						
	6th, 9th, and 12th months of the corporation's tax year $\hfill \ldots$	9	05/15/21	06/15/21	09/15/	21	12/15/21
10	<b>Required installments</b> . 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,			05 251	DE 1		F. 0.6.
	enter 25% (0.25) of line 5 above in each column	10		97,371.	75,1	.⊿5•	57,967.
11	Estimated tax paid or credited for each period. For						
	column (a) only, enter the amount from line 11 on line 15.	١١	194,460.		60,6		10,000.
	See instructions  Complete lines 12 through 19 of one column	11	194,400.		00,0	,04.	10,000.
	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		194,460.	97,0	189.	82,568.
13	Add lines 11 and 12	13		194,460.	157,6		92,568.
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	194,460.	194,460.	157,6	93.	92,568.
16	If the amount on line 15 is zero, subtract line 13 from line	П		-	-		
	14. Otherwise, enter -0-	16		0.		0.	
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	<b>Overpayment.</b> If line 10 is less than line 15, subtract line 10		464			]	
_	from line 15. Then go to line 12 of the next column	18	194,460.	97,089.	82,5	68.	
Go	to Part IV on page 2 to figure the penalty. Do not go to Part I	√ if th	ere are no entries on lir	ie 17 - no penalty is owe	d.		

For Paperwork Reduction Act Notice, see separate instructions.

Form 2220 (2021)

# 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 4/15/2021 and before 7/1/2021	21				
22	Underpayment on line 17 x Number of days on line 21 x 3% (0.03)	22	\$	\$	\$	\$
23	Number of days on line 20 after 6/30/2021 and before 10/1/2021	23				
24	Underpayment on line 17 x Number of days on line 23 x 3% (0.03)	24	\$	\$	\$	\$
25	Number of days on line 20 after 9/30/2021 and before 1/1/2022	25				
26	Underpayment on line 17 x Number of days on line 25 x 3% (0.03)	26	\$	\$	\$	\$
27	Number of days on line 20 after 12/31/2021 and before 4/1/2022	27				
28	Underpayment on line 17 x Number of days on line 27 x 3% (0.03)	28	\$	\$	\$	\$
29	Number of days on line 20 after 3/31/2022 and before 7/1/2022	29				
30	Underpayment on line 17 x Number of days on line 29 x *%	30	\$	\$	\$	\$
31	Number of days on line 20 after 6/30/2022 and before 10/1/2022	31				
32	Underpayment on line 17 x Number of days on line 31 x *%	32	\$	\$	\$	\$
33	Number of days on line 20 after 9/30/2022 and before 1/1/2023	33				
34	Underpayment on line 17 x Number of days on line 33 x *%	34	\$	\$	\$	\$
35	Number of days on line 20 after 12/31/2022 and before 3/16/2023	35				
36	Underpayment on line 17 x Number of days on line 35 x *%	36	\$	\$	\$	\$
37	Add lines 22, 24, 26, 28, 30, 32, 34, and 36	37	\$	\$	\$	\$
38	<b>Penalty.</b> Add columns (a) through (d) of line 37. Enter the to line for other income tax returns				able	38 \$

<sup>\*</sup> 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.

Form **2220** (2021)

PF Page 3

# 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)
1 Enter taxable income for the following periods.		First 3 months	First 5 months	First 8 months	First 11 months
a Tax year beginning in 2018	1a				
<b>b</b> Tax year beginning in 2019	1b				
, , , , , , , , , , , , , , , , , , , ,					
c Tax year beginning in 2020	1c				
2 Enter taxable income for each period for the tax year beginning in					
2021. See the instructions for the treatment of extraordinary items	2				
		First 4 months	First 6 months	First 9 months	Entire year
<b>3</b> Enter taxable income for the following periods.		Tirst 4 months	That o months	That a months	Littile year
a Tax year beginning in 2018	3a				
a rax year beginning in 2010	1				
<b>b</b> Tax year beginning in 2019	3b				
c Tax year beginning in 2020	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>b</b> Extraordinary items (see instructions)	9b				
c Add lines 9a and 9b	9c				
O Figure the tax on the amt on In 9c using the instr for Form					
1120, Sch J, line 2, or comparable line of corp's return	10				
<b>1a</b> Divide the amount in columns (a) through (c) on line 3a					
by the amount in column (d) on line 3a	11a				
<b>b</b> Divide the amount in columns (a) through (c) on line 3b	··· <u>·</u>				
by the amount in column (d) on line 3b	116				
c Divide the amount in columns (a) through (c) on line 3c					
by the amount in column (d) on line 3c	11c				
2 Add lines 11a through 11c	12				
3 Divide line 12 by 3.0	13				
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				
5 Enter any alternative minimum tax (trusts only) for each					
payment period. See instructions	15				
6 Enter any other taxes for each payment period. See instr.	16				
7 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				

Form **2220** (2021)

Page 4

# \*\* Part II Annualized Income Installment Method

_						
			(a)	(b)	(c)	(d)
			First 2	First 4	First 7	First 10
20	Annualization periods (see instructions)	20	months	months	months	months
21	Enter taxable income for each annualization period. See					
	instructions for the treatment of extraordinary items $\dots$	21		1,622,840.	3,354,076.	4,801,317.
22	Annualization amounts (see instructions)	22	6.000000	3.000000	1.714290	1.200000
	<b>a</b> Annualized taxable income. Multiply line 21 by line 22	23a		4,868,520.	5,749,859.	5,761,580.
	<b>b</b> Extraordinary items (see instructions)	23b		4 060 500	F F 40 0 F 0	F F C 1 F C 0
	c Add lines 23a and 23b	23c		4,868,520.	5,749,859.	5,761,580.
24	Figure the tax on the amount on line 23c using the					
	instructions for Form 1120, Schedule J, line 2,			104 741	220 004	220 462
	or comparable line of corporation's return	24		194,741.	229,994.	230,463.
25	Enter any alternative minimum tax (trusts only) for each					
	payment period (see instructions)	25				
00	Enter any other toyon for each neumant nevied. Occilent	0.0				
26	Enter any other taxes for each payment period. See instr.	26				
97	Total tax. Add lines 24 through 26	27		194,741.	229,994.	230,463.
	For each period, enter the same type of credits as allowed	21		194,741.	223,334.	230,403.
20	on Form 2220, lines 1 and 2c. See instructions	28				
20	Total tax after credits. Subtract line 28 from line 27. If	20				
23	zero or less, enter -0-	29		194,741.	229,994.	230,463.
	2010 01 1000, 01101 0					
30	Applicable percentage	30	25%	50%	75%	100%
31	Multiply line 29 by line 30	31		97,371.	172,496.	230,463.
D	art III Required Installments					
	nequired installments					
	Note: Complete lines 32 through 38 of one column		1st	2nd	3rd	4th
	before completing the next column.		installment	installment	installment	installment
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 <b>smaller</b> of the amounts in each		0	0.5. 2.51	150 406	020 462
	column from line 19 or line 31	32	0.	97,371.	172,496.	230,463.
33	Add the amounts in all preceding columns of line 38.				07 271	172 406
• •	See instructions	33			97,371.	172,496.
34	Adjusted seasonal or annualized income installments.			97,371.	75,125.	57,967.
25	Subtract line 33 from line 32. If zero or less, enter -0-	34		91,311.	15,125.	31,301.
30	Enter 25% (0.25) of line 5 on page 1 of Form 2220 in each column. <b>Note:</b> "Large corporations," see the					
	instructions for line 10 for the amounts to enter	35	79,646.	83,216.	81,431.	81,431.
36	Subtract line 38 of the preceding column from line 37 of	33	75,040.	03,210.	01,431.	01,431.
30	the preceding column	36		79,646.	65,491.	71,797.
	the preceding column			7,5,0=0.	UU, EU E	, = , , , , , ,
37	Add lines 35 and 36	37	79,646.	162,862.	146,922.	153,228.
	Required installments. Enter the smaller of line 34 or	<del></del>	13,0200		===,,,===	
	line 37 here and on page 1 of Form 2220, line 10.					
	See instructions	38	0.	97,371.	75,125.	57,967.

Form 2220 (2021)

\*\* ANNUALIZED INCOME INSTALLMENT METHOD USING OPTION 1

FORM 990-PF	DIVIDENDS	AND INTER	EST FROM SEC	URITIES	STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	REVENUE		
BROKERAGE ACCOUNTS - DIVIDENDS	7,743,588.		0. 7,743,58	88. 6,771,637	•
BROKERAGE ACCOUNTS - INTEREST CRYSTAL CAPITAL	15,511.		0. 15,51	.1. 15,511	
FUND SERIES LLC - DIVIDENDS CRYSTAL CAPITAL	464,626.		0. 464,62	296,789	
FUND SERIES LLC - INTEREST MARCH CAPITAL	839,148.		0. 839,14	8. 596,515	
OPPORTUNITIES FUND III - INTEREST MARCH CAPITAL	4,968.		0. 4,96	4,968	
OPPORTUNITIES FUND IV - INTEREST RENAISSANCE	1,733.		0. 1,73	33. 1,733	
INSTITUTIONAL EQUITIES FUND - RENAISSANCE	256,636.		0. 256,63	152,565	
INSTITUTIONAL EQUITIES FUND - SFFRF II -	3,724.		0. 3,72	1,899	•
DIVIDENDS SFFRF II -	967,028.		0. 967,02	967,028	•
INTEREST SFFRF III -	87.		0. 8	87. 87	•
INTEREST	328,360.		0. 328,36	328,360	•
TO PART I, LINE 4	10,625,409.		0. 10,625,40	9,137,092	=
FORM 990-PF		OTHER I	NCOME		STATEMENT 2
DESCRIPTION		:	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
K-1 RENAISSANCE INS		-	12,562.	12,562.	
K-1 CRYSTAL CAPITAL - OTHER INVESTMENT	L FUND SERIES INCOME		-666,307.	-	
K-1 MARCH CAPITAL (	OPP FUND IV -	-			

-270,035. -270,035.

OTHER INVESTMENT INCOME

MAY AND STANLEY SMITH CHARI	TABLE TRUST			**-***2075
K-1 MARCH CAPITAL OPP FUND IN	7 –	-59,684.	-59,684.	
K-1 MARCH CAPITAL OPP FUND II	II -	·	-	
RENTAL REAL ESTATE LOSS OTHER INCOME		-10,534. 31,691.	-10,534. 0.	
K-1 CRYSTAL CAPITAL FUND SERI - UBTI	ES LLC	764,942.	0.	
K-1 MARCH CAPITAL OPP FUND -	UBTI	-117,023.	0.	
TOTAL TO FORM 990-PF, PART I,	LINE 11	-314,388.	-993,998.	<del></del>
FORM 990-PF	LEGAL	FEES	S	ratement 3
	(-)	(-)	/ ~ \	(5)
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES
LEGAL FEES	19,818.			2,919.
TO FM 990-PF, PG 1, LN 16A	19,818.			2,919.
=				
FORM 990-PF	ACCOUNTI	NG FEES	S'.	ratement 4
	(A)	(B)	(C)	(D)
DESCRIPTION	EXPENSES PER BOOKS	NET INVEST- MENT INCOME		CHARITABLE PURPOSES
ACCOUNTING FEES	13,105.			6,553.
ACCOUNTING FEES				0,555.
ACCOUNTING FEES	39,771. 65,760.			19,885. 30,203.
	65,760.			19,885.
ACCOUNTING FEES	65,760.			19,885. 30,203.
ACCOUNTING FEES  TO FORM 990-PF, PG 1, LN 16B	65,760.	SIONAL FEES	S	19,885. 30,203.
ACCOUNTING FEES  TO FORM 990-PF, PG 1, LN 16B	65,760. 118,636.  OTHER PROFES  (A) EXPENSES	SIONAL FEES  (B)  NET INVEST- MENT INCOME	(C) ADJUSTED	19,885. 30,203. 56,641.
ACCOUNTING FEES  TO FORM 990-PF, PG 1, LN 16B  FORM 990-PF	65,760. 118,636.  OTHER PROFES  (A) EXPENSES	(B) NET INVEST-	(C) ADJUSTED	19,885. 30,203. 56,641. TATEMENT 5

FORM 990-PF	TAX	ES 	S	TATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX FEDERAL UBTI FOREIGN TAXES OTHER TAXES	382,496. 661,714. 109,081. 352.			0. 0. 0. 352.
TO FORM 990-PF, PG 1, LN 18	1,153,643.			352.
FORM 990-PF	OTHER E	XPENSES	S	TATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES CHARITABLE CONTRIBUTIONS (FROM PARTNERSHIPS) EQUIPMENT INVESTMENT INSURANCE MEMBERSHIPS OFFICE EXPENSE SUBSCRIPTION SERVICES TELECOMMUNICATIONS UTILITIES OTHER INVESTMENT EXPENSES (BOOK ONLY) TO FORM 990-PF, PG 1, LN 23	135.  1,055. 2,174. 1,212,105. 3,297. 10,867. 15,389. 55,390. 6,627. 3,808.  6,987,857.  8,298,704.			90. 1,055. 2,171. 0. 3,293. 10,853. 10,211. 55,316. 6,618. 3,803. 0. 93,410.
FORM 990-PF OTHER DECREASI	ES IN NET AS	SETS OR FUND	BALANCES S	TATEMENT 8
DESCRIPTION		GUDDENG:		AMOUNT
UNREALIZED GAINS AND UNREALIZED		CURRENCY ADJU	STMENTS —	3,821,123.
TOTAL TO FORM 990-PF, PART I	II, LINE 5			3,821,123

FORM 990-PF CORE	PORATE STOCK		STATEMENT
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK OPTIONS	•	322,108,885. -25,850.	322,108,885
TOTAL TO FORM 990-PF, PART II, LINE	10B	322,083,035.	322,083,035
FORM 990-PF CORE	PORATE BONDS		STATEMENT 1
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS (US)		82,026,503.	82,026,503
TOTAL TO FORM 990-PF, PART II, LINE	10C	82,026,503.	82,026,503
FORM 990-PF OTHER	R INVESTMENTS		STATEMENT 1
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SFF REALTY FUND II SFF REALTY FUND III MARCH CAPITAL OPPORTUNITY FUND III CRYSTAL CAPITAL FUND SERIES LLC MARCH CAPITAL OPPORTUNITY FUND IV	FMV FMV FMV FMV	15,293,323. 2,860,025. 9,962,970. 43,972,753. 2,214,602.	15,293,323 2,860,025 9,962,970 43,972,753 2,214,602
TOTAL TO FORM 990-PF, PART II, LINE	13	74,303,673.	74,303,673

FORM 990-PF

### EXPENDITURE RESPONSIBILITY STATEMENT PART VI-B, LINE 5D

STATEMENT

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GRANTEE'S NAME

MAY WONG SMITH TRUST C/O SCHOOL OF ECONOMICS & FINANCE, UNIV OF ST ANDREWS

GRANTEE'S ADDRESS

CASTLECLIFFE

SAINT ANDREWS FIFE, SCOTLAND, UNITED KINGDOM, KY16 9AJ

GRANT AMOUNT	DATE OF GRANT	AMOUNT EXPENDED	VERIFICATION DATE
300,000.	11/04/11	14,416.	12/22/21

#### PURPOSE OF GRANT

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.

#### DATES OF REPORTS BY GRANTEE

12/22/2021 ANNUAL ER REPORT

#### ANY DIVERSION BY GRANTEE

NO PART HAS BEEN USED FOR OTHER THAN ITS INTENDED PURPOSE

#### RESULTS OF VERIFICATION

THE FOUNDATION REVIEWED THE GRANT REPORT OF 12/22/2021 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)).

FORM 990-PF

## GRANT APPLICATION SUBMISSION INFORMATION PART XIV, LINES 2A THROUGH 2D

13 STATEMENT

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.

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### GENERAL EXPLANATION

STATEMENT 14

#### FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

PART VII-B - 2021 RELATED PARTY FOOTNOTE:

#### **EXPLANATION:**

A TRUSTEE OF THE TRUST IS AN OFFICER IN THE COMPANY THAT PROVIDES TAX RETURN PREPARATION SERVICES TO THE TRUST. THE COMPANY WAS PAID \$13,105 IN 2021.

A TRUSTEE OF THE TRUST WAS HIRED AS CEO UNTIL NOVEMBER 2020. THE TRUSTEE CONTINUES TO BE A PAID CONSULTANT TO THE TRUST. EXPENSES RELATED TO CONSULTING SERVICES FROM THE TRUSTEE TOTALED \$3,648 IN 2021.

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.

#### GENERAL EXPLANATION

15 STATEMENT

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

FORM 990-PF - DISQUALIFIED FROM ELECTRONIC FILING FORM 990-PF

#### **EXPLANATION:**

WE ARE UNABLE TO ELECTRONICALLY FILE FORM 990-PF DUE TO A SOFTWARE LIMITATION. SPECIFICALLY, THE RETURN IS DISQUALIFIED FROM ELECTRONIC FILING DUE TO THE NEGATIVE NUMBER REPORTED ON LINE 7, OTHER INVESTMENT INCOME, ON PART XV-A ANALYSIS OF INCOME-PRODUCING ACTIVITIES.

### UNRELATED BUSINESS INCOME

# **CARRYOVER DATA TO 2022**

Name MAY AND STANLEY SMITH CHARITABLE TRUST	Employer Identification Number **-**2075
Based on the information provided with this return, the following are possible carryover amounts to next year.	
FEDERAL CONTRIBUTION - 50% CASH	23,490,418.
CA CONTRIBUTION - 50% CASH	178,354,419.

FEIN:

\*\*-\*\*\*2075

Type and Entity: CONTRIBUTION - 50 % CASH FED DETAIL CARRYOVER SCHEDULE Section 382 Annual Limitation Section 382 Carryover												
Ī	Year Origi- nated	Original Carryover Amount	Total Amount Used	Amount Used for								
	2016	20 647 657.	Coca									
A B C D E F	2021	23,490,418.										
D												
F												
G H												
I J												
K												
L M												
Ν												
0 P												
Q R S T U V												
S												
Ü												
V W												
	Detail	E Amount S Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for
ı	Туре	E Amount S Used for B C										
Α												
B C												
A B C D E F												
F												
G H												
I J												
K												
L M												
Ν												
0 P												
Q R S T												
S												
Ü V												
V W												

Name:	MAY	AND	STANLEY	SMITH	CHARITABLE	TRU
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FEIN:

\*\*-\*\*\*2075

Type and Entity: CONTRIBUTION - 50% CASH CA  Section 382 Annual Limitation  Section 382 Carryover  DETAIL CARRYOVER SCHEDULE												
	Year Origi- nated 2016	Original Carryover Amount	Total Amount Used	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for
A B C D E F	2017 2018 2021	50,827,553. 104036448.										
.GH_JK												
LMNOP												
.QRSTUV												
V W												
	Detail Type	E Amount S Used for B C	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for	Amount Used for
ABCDEFGH												
1												
J K L M N												
O P Q												
RSTUVW												

25.3

Electronic Filing PDF Attachment





# MAY & STANLEY SMITH CHARITABLE TRUST As of 12/31/2021

20030547 - MAY & STANLEY SMITH CHARITABLE TRUST - SCHWAB			404,109,537.69
AGNC INVT CORP COM	AGNC	233,000.00	2,470,914.00
ALPHABET INC CAP STK CL A	GOOGL	1,150.00	3,331,596.00
AMAZON COM INC COM	AMZN	960.00	3,200,966.40
ANNALY CAPITAL MANAGEMENT INC COM NEW	NLY	444,000.00	3,472,080.00
APOLLO GLOBAL MGMT INC COM	APO	44,000.00	3,186,920.00
APPLE INC COM	AAPL	22,150.00	3,933,175.50
ARES CAPITAL CORP COM	ARCC	183,000.00	3,877,770.00
BLACKROCK STRATEGIC INCOME OPPS INSTL	BSIIX	2,075,956.16	21,070,954.99
BLOCK INC CL A	SQ	12,900.00	2,083,479.00
BOEING COMPANY	ВА	15,700.00	3,160,724.00
BORGWARNER INC COM	BWA	71,500.00	3,222,505.00
CALL (UBER) UBER TECHNOLOGIES INC 01/21/2022 @ \$50	UBER 220121C00050000	-700.00	-11,550.00
CAMBIUM NETWORKS CORP SHS	СМВМ	117,850.00	3,020,495.50



# MAY & STANLEY SMITH CHARITABLE TRUST As of 12/31/2021

	Symbol	Units	Ending Value
DEERE & CO COM	DE	9,600.00	3,291,744.00
FIDELITY NATL INFORMATION SVCS COM	FIS	26,600.00	2,903,390.00
GOLDMAN SACHS GQG PTNRS INTL OPPS INSTL	GSIMX	797,221.46	15,625,540.66
GOLDMAN SACHS GROUP INC COM	GS	8,000.00	3,060,400.00
ISHARES TIPS BOND ETF	TIP	166,000.00	21,447,200.00
JACKSON SQUARE SMID-CAP GROWTH INSTL	JSMTX	845,851.03	22,736,475.61
JANUS HENDERSON FORTY I	JCAPX	498,221.09	28,293,975.42
JEFFERIES FINL GROUP INC COM	JEF	77,700.00	3,014,760.00
MARQETA INC CLASS A COM	MQ	165,000.00	2,833,050.00
MATTHEWS CHINA INVESTOR	MCHFX	740,203.45	15,233,387.06
MEDICAL PPTYS TRUST INC COM	MPW	185,000.00	4,371,550.00
META PLATFORMS INC	META	9,700.00	3,262,595.00
MICROSOFT CORP COM	MSFT	10,700.00	3,598,624.00
NETFLIX INC COM	NFLX	5,175.00	3,117,627.00
PARNASSUS CORE EQUITY INSTITUTIONAL	PRILX	367,563.40	23,358,653.75

25,800.00

2,989,704.00



VMWARE INC CL A COM

# MAY & STANLEY SMITH CHARITABLE TRUST As of 12/31/2021

	Symbol	Units	Ending Value
	Symbol	Office	Lifeting value
PAYPAL HLDGS INC COM	PYPL	16,000.00	3,017,280.00
PGIM TOTAL RETURN BOND Z	PDBZX	1,425,758.66	20,630,727.82
PIMCO INCOME INSTL	PIMIX	1,785,981.13	21,053,984.69
PULTE GROUP INC COM	РНМ	66,800.00	3,818,288.00
PUTNAM INCOME Y	PNCYX	2,852,768.66	19,541,465.29
QUALCOMM INC COM	QCOM	25,100.00	4,590,037.00
RINGCENTRAL INC CL A	RNG	13,500.00	2,529,225.00
SPDR S&P 500 ETF TRUST	SPY	167,175.00	79,401,438.00
STEEL DYNAMICS INC CLL OPT 01/22 70.0 CAL	STLD 220121C00070000	-520.00	-14,300.00
STEEL DYNAMICS INC COM	STLD	52,000.00	3,227,640.00
SUNRUN INC COM	RUN	62,800.00	2,154,040.00
TWITTER INC COM	TWTR	63,400.00	2,740,148.00
UBER TECHNOLOGIES INC COM	UBER	70,000.00	2,935,100.00
VANGUARD TOTAL INTERNATIONAL STOCK ETF	VXUS	310,000.00	19,706,700.00
VISA INC COM CL A	V	16,700.00	3,619,057.00

VMW

# May and Stanley Smith Charitable Trust

94-6622075

Form 990-PF - Part XIV Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment For Year Ended December 31, 2021

# 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 2021
A Home Within Inc. Oakland, CA	N/A	PC	To provide mental health services for foster youth for as long as needed	\$75,000
A Home Within Inc. Oakland, CA	N/A	PC	To provide mental health services for foster youth for as long as needed	\$50,000
A Sanctuary For Military Families Inc. Granby, CO	N/A	PC	To assist in the reintegration of military families through therapeutic retreats and support	\$100,000
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	\$20,000
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 options	\$50,000
Affordable Living for the Aging West Hollywood, CA	N/A	PC	To provide low-income older adults with supportive housing and home-sharing options	\$25,000
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	\$25,000
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
Alzheimer's Disease and Related Disorders Association Inc. Chicago, IL	N/A	PC	To expand dementia related volunteer caregiver support to five rocky mountain rural states	\$275,000
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	\$25,000
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	\$50,000
Another Chance House Amarillo, TX	N/A	PC	To provide housing and supportive services to homeless veterans in the Texas panhandle	\$40,000
Another Chance House Amarillo, TX	N/A	PC	To upgrade the kitchen in the main house to commercial standards	\$20,000
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
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	\$75,000

			To support the Warrior Canine	
Assistance Dogs of the West Santa Fe, NM			Connection program using	
Santa i e, ivivi	N/A	PC	veterans as trainers	\$50,000
Association of Small Foundations				
Washington, DC	N/A	PC	2021 Membership Dues	\$1,000
	1.47.1	1.5	To support youth to transition	<del>+ 1,000</del>
At The Crossroads San Francisco, CA			from homelessness to stability	
Suit Fullersco, CA	N/A	PC	and improved well-being	\$60,000
Autistic Self Advocacy Network			To develop tools and resources for Autism self-advocates to	
Washington, DC			respond to inequities due to the	
_	N/A	PC	intersection of race and disability	\$100,000
Banner Alzheimer's Foundation			To provide culturally competent	
Phoenix, AZ	N/A	PC	caregiving tools that serve Native American dementia patients	\$70,000
	IN/A	FC	To provide sports, recreation, and	\$70,000
Bay Area Outreach and Recreation Program			outdoor adventures to people	
Berkeley, CA			with physical and visual	<b>4.5.000</b>
<i>''</i>	N/A	PC	disabilities  To provide case	\$45,000
BC Aboriginal Network on Disability		NC (Foreign	management/navigation services	
Society		Public	for Indigenous Canadian adults	
Victoria, BC Canada	N/A	Charity Equivalent)	with disabilities on reservations and in the community	\$100,000
	IN/A	Equivalent	To support its assistance to the	\$100,000
BC Aboriginal Network on Disability			federal government in developing	
Society		NC (Foreign	and providing additional	
Victoria, BC Canada		Public Charity	programs and services specific to COVID-19 within the Indigenous	
	N/A	Equivalent)	population of British Columbia	\$50,000
			To provide inclusive, supported	
Best Buddies International Inc. Miami, FL			employment opportunities in professional work environments	
Wilding, I E	N/A	PC	for young adults with I/DD	\$150,000
			To provide inclusive, supported	
Best Buddies International Inc. Miami, FL			employment opportunities in professional work environments	
ivilailii, FL	N/A	PC	for young adults with I/DD	\$75,000
Dot Trodak			To provide free legal services to	·
Bet Tzedek Los Angeles, CA			low-income adults with I/DD and	
, , , , , , , , , , , , , , , , , , ,	N/A	PC	their families/caregivers	\$75,000
Beyond Emancipation			To provide comprehensive	
Oakland, CA	N/A	PC	support to Alameda County's foster youth	\$40,000
Big Brothers Big Sisters of San Diego	<u> </u>		To provide mentoring support for	, -,
County Inc.			military children in the San Diego	
San Diego, CA	N/A	PC	area	\$100,000
Dive Ster Femilies Inc.				
Blue Star Families Inc. Encinitas, CA			To provide community connection and support to	
,	N/A	PC	military families	\$100,000
				·
BoardSource				
Washington, DC				
	N/A	PC	2021 Membership Dues	\$3,500
	1.7/1	1.5	To improve quality of life for	73,300
Bread & Roses Presents Corte Madera, CA			elders in long-term care through	
Corte ividuera, CA	N/A	PC	high quality live entertainment	\$50,000
Bridge Meadows			To create and sustain	
Portland, OR			intergenerational communities for foster youth, adoptive	
	N/A	PC	families, & elders	\$75,000
Bridges from School to Work Inc.			To transform the lives of young	
Bethesda, MD	N/A	DC.	adults with disabilities through	\$100,000
	N/A	PC	employment  To support foster youth to	\$100,000
Cal State Fullerton Philanthropic Foundation			graduate from college and	
Fullerton, CA	N / A	DC.	prepare them to thrive after	ć20.000
	N/A	PC	graduation	\$20,000

	1	1		
Cal State Fullerton Philanthropic			To support foster youth to	
Foundation			graduate from college and prepare them to thrive after	
Fullerton, CA	N/A	PC	graduation	\$50,000
	,		0	, ,
California Youth Connection			To develop foster youths'	
Emeryville, CA	N/A	PC	leadership and advocacy skills	\$125,000
			To provide a barrier-free camp	
Camp For All Foundation			experience for adults and	
Houston, TX			transitioning youth with	<b>450.000</b>
	N/A	PC	disabilities	\$50,000
Candid				
New York, NY	N/A	PC	2021 Membership Dues	\$19,381
Canine Companions For	IN/A	PC PC	To provide trained assistance	\$15,561
Independence			dogs for adults who are deaf or	
Santa Rosa, CA	N/A	PC	hard of hearing	\$100,000
Caregivers Volunteers Assisting the			To provide trained volunteer	
Elderly			support that enables homebound	
Ventura, CA	N/A	PC	elders to live independently	\$60,000
Caregivers Volunteers Assisting the			To provide trained volunteer	
Elderly			support that enables homebound	
Ventura, CA	N/A	PC	elders to live independently	\$30,000
CASA of Los Appelos			To provide foster youth with	
CASA of Los Angeles Monterey Park, CA			trained volunteers who serve as	
Williams, CA	N/A	PC	advocates and mentors	\$50,000
Catholic Charities Of The			To provide counseling, career	
Archdiocese Of Galveston-Houston			support, housing, and other	
Houston, TX	N1/A	DC.	assistance to homeless women	¢100.000
	N/A	PC	veterans in the Houston area  To support the Pandemic Relief	\$100,000
Catholic Charities Of The			Fund at Catholic Charities of the	
Archdiocese Of Galveston-Houston			Archdiocese of Galveston-	
Houston, TX	N/A	PC	Houston	\$50,000
Catholic Community Services Of			To provide services and support	
Southern Arizona Inc.			for adults who are deaf, deaf-	
Tucson, AZ	N/A	PC	blind, or deaf-disabled	\$100,000
Center for Disaster Philanthropy Inc.				
Washington, DC	N/A	PC	2021 Membership Dues	\$10,000
Center for Innovation Inc.			To deinstitutionalize long-term	
Linthicum, MD			care and advance a person-	4400000
· · · · · · · · · · · · · · · · · · ·	N/A	PC	centered approach in elder care	\$100,000
Center For Youth Wellness			To increase awareness of and	
San Francisco, CA	11/0	DC	improve the treatment of	ć425 000
	N/A	PC	Adverse Childhood Experiences	\$125,000
Channel Islands Young Men's Christian Association			To provide case management and	
Santa Barbara, CA	N1/A	PC	transitional housing to former	\$20,000
,	N/A	PC	foster and homeless youth	\$20,000
Channel Islands Young Men's Christian Association			To provide case management and	
Santa Barbara, CA	N/A	PC	transitional housing to former foster and homeless youth	\$35,000
·	IV/		To provide foster youth with	755,000
Child Advocates of Silicon Valley Inc.			trained volunteers who serve as	
Milpitas, CA	N/A	PC	advocates and mentors	\$40,000
Child Bridge Inc				
Child Bridge Inc. Bigfork, MT			To recruit and support foster and	
2.5.01.01.01	N/A	PC	adoptive families in Montana	\$50,000
Children and Youth Justice Center			To support foster, homeless, and	
Seattle, WA	1 21/2		juvenile justice-involved youth in	450.005
	N/A	PC	Washington State	\$50,000
Children Now				
Oakland, CA	N/A	DC.	To support policies and practices	¢100.000
	N/A	PC	that enhance child well-being  To ensure youth are safe and	\$100,000
Children's Rights Inc.			supported when in out-of-home	
New York, NY	N/A	PC	care	\$100,000
	† '	NC (Foreign	-	, ===,000
Churchie Foundation Limited		Public	To create an endowment that	
	1		1	
East Brisbane, Australia	N/A	Charity Equivalent)	supports scholarships for Churchie alumni	\$334,000

Churchie Foundation Limited East Brisbane, Australia		NC (Foreign Public Charity	To provide scholarships and financial aid to students at	
Churchie Foundation Limited	N/A	Equivalent) NC (Foreign Public	Anglican Church Grammar School  To provide scholarships for Churchie alumni to study in the	\$125,000
East Brisbane, Australia	N/A	Charity Equivalent)	United States and United Kingdom	\$75,000
Civic Ventures San Francisco, CA			To create a society that views older adults as valuable	
Sali Francisco, CA	N/A	PC	intergenerational contributors	\$225,000
Coastal Roots Farm Encinitas, CA	NI/A	DC.	To nourish older adults with organic foods and foster	¢50,000
Code of Compant Foundation	N/A	PC	intergenerational connections  To provide intake, referral, and	\$50,000
Code of Support Foundation Alexandria, VA	N/A	PC	case coordination services for veterans nationwide	\$100,000
Colorado Seminary Denver, CO	21/2	DC.	To provide pro bono legal services, representation, and advice to veterans in Colorado	¢c5 000
Colorado State University	N/A	PC	To provide college transition and	\$65,000
Foundation Fort Collins, CO	N/A	PC	academic support for students with autism or brain injuries	\$50,000
Combined Arms Houston, TX	N/A	PC	To support collaboration among veteran-serving organizations in Texas	\$75,000
Community Entry Services Inc. Riverton, WY	N/A	PC	To provide comprehensive services and supports for adults with disabilities	\$75,000
Community Housing Partnership San Francisco, CA	N/A	PC	To provide supportive housing to homeless transitional age youth	\$40,000
Community Housing Partnership San Francisco, CA	N/A	PC	To provide supportive housing to homeless transitional age youth	\$125,000
Community Living Campaign San Francisco, CA		PC	To provide basic necessities and community engagement through	
Community Living Campaign	N/A	PC	To support and empower older adults to plan for their care needs	\$32,000
San Francisco, CA	N/A	PC	in order to safely age in place	\$100,000
Community Music Center San Francisco, CA	N/A	PC	To foster community engagement and lifelong learning for older adults through choir participation	\$60,000
Community Solutions International Inc.			To provide capacity building for communities to address veteran	7 - 2, - 2 - 2
New York, NY	N/A	PC	homelessness in the western U.S.	\$100,000
Conejo Valley Senior Concerns Thousand Oaks, CA	N/A	PC	To provide supportive services for elders and family caregivers	\$50,000
Conejo Valley Senior Concerns				. ,
Thousand Oaks, CA	N/A	PC	To provide supportive services for elders and family caregivers	\$20,000
Contra Costa Senior Legal Services Concord, CA	N/A	PC	To provide legal assistance to older adults with disabilities or	\$60,000
Contra Costa Senior Legal Services Concord, CA			To provide legal assistance to older adults with disabilities or	
Corporation for Supportive Housing Los Angeles, CA	N/A	PC	experiencing poverty  To advance policies benefitting older adults who are homeless or	\$15,000
Council on Foundations Inc.	N/A	PC	unnecessarily institutionalized	\$225,000
Philadelphia, PA	N/A	PC	2021 Membership Dues	\$19,000

Court Appointed Special Advocates Of Travis County Austin, TX	N/A	PC	To support Travis County 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
Denver Indian Family Resource Center Denver, CO	N/A	PC	To support and strengthen Native American families and prevent child welfare involvement	\$50,000
Denver Indian Family Resource Center Denver, CO	N/A	PC	To support and strengthen 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, transitional housing, and support services to at-risk 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
Downtown Women's Center Los Angeles, CA	N/A	PC	To provide general operating support for COVID-related expenses	\$50,000
Duet Partners In Health & Aging Inc. Phoenix, AZ	N/A	PC	To provide volunteer-assisted transportation and support to homebound elders	\$60,000
East Bay Innovations Inc. San Leandro, CA	N/A	PC	To expand private-pay individualized care management by trained local service providers	\$190,000
Ecumenical Center for Religion and Health San Antonio, TX	N/A	PC	To provide mental health services to older adults in rural communities in south Texas	\$25,000
Ecumenical Center for Religion and Health San Antonio, TX	N/A	PC	To provide mental health services to older adults in rural communities in south Texas	\$50,000
Elderhelp of San Diego San Diego, CA	N/A	PC	To support elders' independence and quality of life by providing trained volunteer support	\$65,000
Empowered Aging Pleasant Hill, CA	N/A	PC	To support the highest quality of care for residents of long-term care facilities to prevent abuse	\$75,000
Engage Inc. Burbank, CA	N/A	PC	To offer high quality lifelong learning for low-income elders residing in affordable housing	\$150,000
Engage Inc. Burbank, CA	N/A	PC	To support food distribution and technology needs of elders	\$50,000
Every Child Counts Abaco, Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To provide educational opportunities for students with disabilities and support rebuilding in the aftermath of Hurricane Dorian	\$40,000
Extraordinary Families Los Angeles, CA	N/A	PC	To recruit and support families for foster youth and support youth aging out of foster care	\$100,000
Family Builders By Adoption Oakland, CA	N/A	PC	To find permanent families for children and youth in the Bay	\$50,000
Family Eldercare Inc. Austin, TX	N/A	PC	To help elders age in place through coordination of and connections to needed services	\$120,000
Family Eldercare Inc. Austin, TX	N/A	PC	To help elders age in place through coordination of and connections to needed services	\$50,000

Farmer Veteran Coalition			To support veterans pursuing	
Woodland, CA	N/A	PC	careers in agriculture with mentoring and resources	\$100,000
	N/A		To support COVID-19 relief	\$100,000
			offered by Native American and	
First Nations Development Institute			Alaskan Native nonprofits and	
Longmont, CO			communities to Native people	
,			from the Trust's focus populations in its geographic	
	N/A	PC	region	\$300,000
	.,,	1.5	To provide housing and	7000,000
First Place for Youth			wraparound services to youth	
Oakland, CA	N/A	PC	transitioning from foster care	\$125,000
Food For Thought			To provide nutritious, medically	
Forestville, CA	1		tailored meals and food	
·	N/A	PC	assistance for low-income elders	\$62,500
Food For Thought			To provide nutritious, medically tailored meals and food	
Forestville, CA	N/A	PC	assistance for low-income elders	\$30,000
	1,,	1.5	To provide virtual programming	700,000
Foster Youth in Action			and social support to foster youth	
Berkeley, CA	N/A	PC	during the pandemic	\$30,000
			To connect current and foster	
Fosterclub			youth to resources and support	
Seaside, OR	N. /A	200	foster youth leaders to advocate	Ć435 000
	N/A	PC	for policy change	\$125,000
Foundation for Students Rising Above			To support foster youth to	
San Francisco, CA	N/A	PC	graduate from college and succeed in the workforce	\$25,000
	N/A	PC PC	succeed in the workforce	323,000
Foundation for Students Rising				
Above			To support factor vouth to	
San Francisco, CA			To support foster youth to graduate from college and	
	N/A	PC	succeed in the workforce	\$50,000
	,			. ,
Freedom Service Dogs Inc.			To provide custom-trained service	
Englewood, CO	N/A	PC	dogs for adults with disabilities	\$50,000
Friends of the Children - National			To provide academic support and	
Office			connections to needed resources	
Portland, OR	N/A	PC	for youth and their families	\$50,000
Funders for Lesbian and Gay Issues				
Inc. New York, CA		200	To support the 2021 Funding	<b>64.000</b>
	N/A	PC	Forward Conference	\$1,800
Funders Together to End Homelessness Inc				
Boston, MA	N/A	PC	2021 Membership Dues	\$3,000
20000.,	IN/A	PC PC	To provide supportive services	\$3,000
Goodwill Industries of New Mexico			and employment training and	
Albuquerque, NM			assistance to veterans and family	
	N/A	PC	members in New Mexico	\$50,000
Grant A Gift Autism Foundation			To provide vocational training for	
Las Vegas, NV	NI/A	PC	transitioning youth and adults with autism in Nevada	¢50,000
Construction for Effective	N/A	PC	with autism in Nevada	\$50,000
Grantmakers for Effective Organizations				
Washington, DC	N/A	PC	2021 Membership Dues	\$7,390
	14//	1.0	2021 Wellibership Bues	77,330
Grantmakers In Aging Inc.				
White Plains, NY	N/A	PC	2021 Membership Dues	\$5,500
	.,,	1.2	To provide guide dogs to adults	+=/===
Guiding Eyes for the Blind Inc.			with multiple disabilities that	
Yorktown Heights, NY	N/A	PC	include visual impairment	\$25,000
Hand Change Dunie		İ		· · · · · · · · · · · · · · · · · · ·
Head Strong Project Inc. New York, NY			To provide mental health care to	
INCW TUIK, INT	N/A	PC	post-9/11 veterans	\$50,000
Hoarts P. Minds Astivity Contac			To provide social day programs	
Hearts & Minds Activity Center San Jose, CA			for elders with dementia and	
Jun 1030, CA	N/A	PC	support for their family caregivers	\$52,000
Hearts & Minds Activity Center			To provide social day programs	<u> </u>
·		1	for elders with dementia and	
San Jose, CA			support for their family caregivers	

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			To provide personalized career assistance to transitioning service	
Home Front Military Network Colorado Springs, CO	N/A N/A	PC PC	members, veterans, and spouses  To provide a coordinated entry point to access services for military service members, veterans, and their families	\$250,000 \$50,000
Home Front Military Network Colorado Springs, CO	N/A	PC	To provide case management and emergency financial assistance to veterans and military families in Colorado	\$25,000
Homeless Youth Alliance Inc. San Francisco, CA	N/A	PC	To provide supportive services to homeless youth in San Francisco	\$30,000
Homeless Youth Alliance Inc. San Francisco, CA	N/A	PC	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
Homeward Bound of Marin Novato, CA	N/A	PC	To support construction of the Veterans Supportive Housing project in Novato	\$300,000
Homeward Bound of Marin Novato, CA	N/A	PC	To provide housing and employment services to homeless individuals and families in Marin County	\$35,000
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 residents of long-term care settings from abuse	\$100,000
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 agencies serving people with I/DD across British	\$30,000
Inclusion BC Society New Westminster, BC Canada		NC (Foreign Public Charity	To be the convener, conduit, and collective public voice for local community agencies serving people with I/DD across British	
Individuals Now Inc. Social Advocates For Youth	N/A	Equivalent)	Columbia  To provide housing and supportive services to homeless	\$60,000
Santa Rosa, CA Individuals Now Inc. Social Advocates For Youth Santa Rosa, CA	N/A N/A	PC PC	and former foster youth  To provide housing and supportive services to homeless and former foster youth	\$40,000 \$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
Inner City Law Center Los Angeles, CA	N/A	PC	To provide free legal services to homeless, low-income individuals in Los Angeles	\$25,000
Institute On Aging San Francisco, CA	N/A	PC	To provide necessary supports and services to enable older adults to age in place	\$50,000

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 activities for elders with dementia, and respite for caregivers	\$40,000
Interfaith Community Services Inc. Escondido, CA			To provide mental health services to low-income veterans in North	
	N/A	PC	San Diego County	\$125,000
Interfaith Community Services Inc.			To service to low-income and homeless individuals in San Diego	
Escondido, CA	N/A	PC	County	\$75,000
Iraq and Afghanistan Veterans of America Inc. New York, NY	N/A	PC	To provide benefit and services navigation assistance to transitioning veterans and family members	\$50,000
Jewish Community Relations Council of San Francisco Marin & Peninsula San Francisco, CA	N/A	PC	To engage older adults as literacy tutors for K-3 schoolchildren	\$65,000
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			To provide life skills training and supported employment opportunities to adults with	
	N/A	PC	disabilities, and family support	\$150,000
Jewish Family Service Houston, TX			To provide emergency funds for laptops and zoom licenses for 10 staff members and the increase of staff hours and hiring of extra	
	N/A	PC /Foreign	staff	\$50,000
Jewish Family Services Agency of Vancouver Vancouver, BC Canada		NC (Foreign Public Charity	To provide care management and comprehensive support services	
	N/A	Equivalent) NC (Foreign	to elders and their families	\$35,000
Jewish Family Services Agency of Vancouver Vancouver, BC Canada		Public Charity	To provide care management and comprehensive support services	
	N/A	Equivalent)	to elders and their families  To assist California's foster and	\$75,000
John Burton Advocates for Youth San Francisco, CA	N/A	PC	homeless youth access education, housing, and health care	\$110,000
Juma Ventures San Francisco, CA	N/0	DC.	To help foster youth gain job experience and prepare them for	¢50,000
	N/A	PC	careers	\$50,000
Jumping Mouse Childrens Center Port Townsend, WA	N/A	PC	To provide therapy to at-risk children and support for their caregivers	\$50,000
Just in Time for Foster Youth San Diego, CA	N/A	PC	To support foster youth to become independent and self-sufficient	\$75,000
Justice In Aging Oakland, CA	INVA	rc	To utilize training, policy innovation, and litigation to	\$73,000
Kennesaw State University	N/A	PC	improve systems affecting elders  To use solution-based journalism	\$200,000
Foundation Inc. Kennesaw, GA	N/A	PC	to advance child welfare reform in New Mexico	\$115,000
Kindering Center Bellevue, WA	N/A	PC	To support the social and emotional development of infants and toddlers in foster care	\$40,000
Lanakila Pacific Honolulu, HI			To provide services and supports for adults with disabilities to enhance employment opportunities, community inclusion, and overall quality of	·
Larkin Street Youth Services San Francisco, CA	N/A	PC	To support homeless youth and youth at-risk of homelessness in	\$50,000
Jan Francisco, CA	N/A	PC	San Francisco	\$40,000
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	N/A	100	To provide legal education and free civil legal services for	<del> </del>
San Jose, CA	N/A	PC	transition-age foster youth  To provide free legal	\$75,000
Legal Services For Children Inc. San Francisco, CA	N/A	PC	representation and social work services to children and youth	\$125,000
LIFE Eldercare Inc. Fremont, CA	,		To provide transportation and supportive services to assist	. ,
Tremone, ex	N/A	PC	elders to safely age in place  To provide homelessness services	\$50,000
LifeMoves Menlo Park, CA	N/A	PC	to veterans and their families in Silicon Valley	\$100,000
LifeMoves Menlo Park, CA		200	To provide services to homeless individuals and families in Silicon	<b>450.000</b>
	N/A	PC	Valley  To engage elders through arts	\$50,000
Lifetime Arts New Rochelle, NY	N/A	PC	programing and partner with public libraries across Wyoming	\$75,000
Lighthouse for the Blind Inc. Seattle, WA			To promote workplace advancement and full participation in the community	
Los Angeles City College Foundation	N/A	PC	for adults who are deaf-blind  To support current and former	\$40,000
Los Angeles, CA	N/A	PC	foster youth to enroll, persist, and graduate from college	\$30,000
Los Angeles LGBT Center Los Angeles, CA	N/A	PC	To provide supportive services to LGBT older adults living in Los	\$100,000
Las Avaralas I CDT Cantan	IN/A	PC	Angeles County  To provide food distribution	\$100,000
Los Angeles LGBT Center Los Angeles, CA	N/A	PC	services during COVID-19 to LGBT older adults	\$50,000
Lyford Cay Foundation Inc. New York, NY			To prepare low-income Bahamian students for high school graduation and post-secondary or	
New Tork, Wi	N/A	PC	career technical education	\$100,000
Marbridge Foundation Inc. Manchaca, TX			To provide adults with disabilities with training and education to achieve personal goals within a	4
	N/A	PC	residential community setting  To provide a continuum of care	\$100,000
Marin Brain Injury Network Larkspur, CA	N/A	PC	for individuals with acquired brain injuries and their families	\$40,000
Marin Center for Independent Living San Rafael, CA			To bridge the digital divide for people with disabilities and their families, paid caregivers, and	
	N/A	PC	provider support staff  To improve the health and quality	\$100,000
Marin Humane Society Novato, CA	N/A	PC	of life of low-income seniors through pet care support	\$25,000
Meals on Wheels Diablo Region			To provide community engagement, fall prevention, and	
Walnut Creek, CA	N/A	PC	care management services to older adults	\$30,000
Meals on Wheels Diablo Region Walnut Creek, CA			To provide community engagement, fall prevention, and care management services to	
Mental Health America of Greater	N/A	PC	older adults  To provide peer navigation and	\$60,000
Houston Inc. Houston, TX	N/A	PC	mentorship support to veterans in the greater Houston area	\$50,000
Mercy Retirement Care Center Oakland, CA	N/A	PC	To provide food and basic necessities to older adult clients in the Bay Area	\$20,000
Mercy Retirement Care Center Oakland, CA			To provide nutritious groceries and fresh produce to support	
Military Child Education Coalition	N/A	PC	older adults' food security	\$35,000
Harker Heights, TX	N/A	PC	To support the education of military children worldwide	\$100,000

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	\$95,000
Mountain Home Montana Inc. Missoula, MT	N/A	PC	To support young mothers and their children who are at risk of child welfare involvement	\$30,000
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
Mt. Carmel Veterans Service Center Colorado Springs, CO	N/A	PC	To support service members, veterans, and their families in the Colorado Springs community	\$50,000
My Possibilities Plano, TX	N/A	PC	To provide employment services and support for adults with I/DD	\$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 Hoaloha-Maui Interfaith Volunteer Caregivers Wailuku, HI Na Hoaloha-Maui Interfaith	N/A	PC	To provide trained volunteer support that enables homebound elders to live independently  To provide trained volunteer	\$10,000
Volunteer Caregivers Wailuku, HI Nami	N/A	PC	support that enables homebound elders to live independently  To provide training for caregivers	\$60,000
Arlington, VA	N/A	PC	and family members supporting veterans with mental illness  To provide sports, recreation, and	\$100,000
National Ability Center Park City, UT	N/A	PC	educational programs for adults, families, and friends affected by a disability	\$75,000
National Center for Youth Law Oakland, CA	N/A	PC	To improve the educational outcomes of Arizona's foster youth	\$100,000
National Coalition for Homeless Veterans Washington, DC	N/A	PC	2021 Membership Dues	\$1,000
National Domestic Workers Alliance Inc. New York, NY	N/A	PC	To advance state and federal policies that support caregivers across the lifespan	\$250,000
National Low Income Housing Coalition Washington, DC	N/A	PC	To prevent evictions and ensure housing stability for households affected by the pandemic	\$300,000
National Sports Center for the Disabled Inc. Denver, CO	N/A	PC	To provide high quality accessible, adaptive outdoor sports and therapeutic recreation programs	\$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
Nevada Rural Counties RSVP Program Inc. Carson City, NV	N/A	PC	To support elders and caregivers to meet basic needs and facilitate older adult volunteerism	\$50,000
New Avenues for Youth Inc. Portland, OR	N/A	PC	To support youth who are experiencing or at risk of homelessness in Portland, OR	\$25,000
New Avenues for Youth Inc. Portland, OR			To support youth who are	
	N/A	PC	experiencing or at risk of homelessness in Portland, OR	\$100,000

New Directions for People with Disabilities Inc.			To provide educational and	
Santa Barbara, CA	N/A	PC	inclusive travel opportunities for adults with disabilities	\$50,000
New Directions Inc.			To provide substance-abuse treatment, counseling, and	
Los Angeles, CA	N/A	PC	housing services to veterans and families	\$50,000
New Directions Inc.			To provide substance-abuse treatment, counseling, and	. ,
Los Angeles, CA			housing services to veterans and	
	N/A	PC	families  To prepare youth for success in	\$100,000
New Door Ventures San Francisco, CA	N/A	PC	work and life through 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
Noah Homes Inc. Spring Valley, CA	N/A	PC	To provide residential and support services for adults with developmental disabilities	\$35,000
Northern California Grantmakers San Francisco, CA			To support Northern California Grantmakers leadership in the field of Disaster Philanthropy and	
	N/A	PC	Climate Change	\$20,000
Northern California Grantmakers San Francisco, CA				
,	N/A	PC	2021 MEmbership Dues  To provide housing and services	\$14,250
Northwest Housing Alternatives Inc. Milwaukie, OR			to older adults with low incomes	
,	N/A	PC	to prevent evictions  To provide housing and services	\$25,000
Northwest Housing Alternatives Inc. Milwaukie, OR			to older adults with low incomes	4
Northwest buties Desirat	N/A	PC	to prevent evictions  To provide legal services to low-	\$55,000
Northwest Justice Project Seattle, WA	N/A	PC	income veterans in Washington State	\$100,000
	14//		To provide information	7100,000
NPower Inc. Brooklyn, NY	N/A	PC	technology training and career support to veterans in Texas and California	\$25,000
NPower Inc.			To provide information technology training and career	
Brooklyn, NY			support to veterans in Texas and	
	N/A	PC	California  To provide culturally sensitive	\$100,000
On Lok Day Services San Francisco, CA	N/A	PC	senior wellness programs, healthy meals, and case management	\$35,000
On Lok Day Services			To provide culturally sensitive senior wellness programs, healthy	<del> </del>
San Francisco, CA	N/A	PC	meals, and case management	\$75,000
On The Move Napa, CA	N/A	PC	To support foster youth to successfully transition into independent adulthood	\$50,000
On The Move Napa, CA		_	To support foster youth to successfully transition into	
	N/A	PC	independent adulthood  To provide inclusive housing and	\$75,000
Openhouse San Francisco, CA	N/A	PC	supportive services for LGBT elders to age safely in place.	\$50,000
Openhouse San Francisco, CA	NI/A	DC.	To provide inclusive housing and supportive services for LGBT	¢12E 000
	N/A	PC	elders to age safely in place.  To provide stable transitional	\$125,000
Operation Homefront Inc. San Antonio, TX			housing and support for wounded, ill, and injured veterans	
,	N/A	PC	and their families	\$50,000

			To provide stable transitional	
Operation Homefront Inc. San Antonio, TX			housing and support for wounded, ill, and injured veterans	
Sall Alitolilo, 1X	N/A	PC	and their families	\$100,000
	,		To provide housing and	. ,
Our House of Portland Inc.			supportive services to formerly	
Portland, OR	N1/A	D.C.	homeless older adults living with	¢20.000
	N/A	PC	HIV/AIDS	\$30,000
Outdoors For All Foundation			To another the sound the of the form	
Seattle, WA	N/A	PC	To enrich the quality of life for adults and transitioning youth	\$50,000
	11/A		with disabilities through outdoor	330,000 j
			recreation	
		NC (Foreign	To breed, train, place, and	
Pacific Assistance Dogs Society		Public	support certified service dogs to	
Burnaby, BC Canada	1	Charity	increase the independence of	450.000
	N/A	Equivalent)	people living with disabilities	\$50,000
PEAK Grantmaking, Inc. Washington, DC	N1/A	D.C.	2021 Mansharahin Duas	ć2.4F2
	N/A	PC	2021 Membership Dues	\$3,152
Philanthropy Northwest Seattle, WA	N /A	PC	2021 Mambarshin Duas	ĆE 40E
,	N/A	PC	2021 Membership Dues	\$5,405
Philanthropy Southwest Dallas, TX	N/A	PC	2021 Mambarship Duos	\$6,000
Sunus, IX	IN/A	FC	2021 Membership Dues	ο,υυυ
Pike Market Senior Center			To offer food, housing placement	
Seattle, WA	N/A	PC	and retention support, and social programs for older adults	\$50,000
	IN/A	r C	To promote culture change and	\$30,000
Pioneer Network In Culture Change			individualized, person-centered	
Rochester, NY	N/A	PC	care in long-term care settings	\$50,000
			To empower families to plan and	
Plan Institute for Citizenship &		NC (Foreign	secure the future for their relative	
Disability Nanada		Public	with a disability and to build	
Vancouver, BC Canada	N/A	Charity Equivalent)	supportive community connections	\$100,000
	IN/A	NC (Foreign	Connections	\$100,000
Power To Be Adventure Therapy		Public	To provide inclusive adaptive	
Society Vistoria BC Canada		Charity	recreation programming for	
Victoria, BC Canada	N/A	Equivalent)	adults with disabilities	\$80,000
Project Angel Heart			To provide COVID-19 vaccine	
Denver, CO			access to older adult populations	
	N/A	PC	in marginalized communities	\$38,000
Project Avary Inc.			To support the social-emotional	
San Rafael, CA	N/A	PC	development of youth with incarcerated parents	\$50,000
	19/7	10	To support foster youth to	\$30,000
Promises2Kids Foundation			prepare for and enroll in post-	
San Diego, CA	N/A	PC	secondary education	\$75,000
			To support organizational	
PsychArmor Institute Inc.			sustainability in providing free	
San Diego, CA	N /A	DC.	veteran-focused training	¢50,000
	N/A	PC	programs	\$50,000
Public Counsel			To protect the legal rights of	
Los Angeles, CA	N/A	PC	foster and guardianship youth in	\$30,000
	IN/A	PC	Los Angeles	\$50,000
Public Counsel			To protect the legal rights of	
Los Angeles, CA	N/A	PC	foster and guardianship youth in Los Angeles	\$150,000
Public Policy Institute of California	IN/A	FC		\$130,000
San Francisco, CA	N/A	PC	To support the 2021 Speaker Series on California's Future	\$10,000
	17/7	10	Series on Camornia's Future	\$10,000
Raise The Future			To support the adoption of hard	
Denver, CO	N/A	PC	to place foster youth	\$75,000
	1-7:		I process your	Ţ,3,500
Recovery Resource Council			To provide mental backbacks	
Fort Worth, TX			To provide mental health care for service members, veterans, and	
<u> </u>	N/A	PC	their families in North Texas	\$100,000
Regents of the University of	,		To support expansion of the Peer	,3
Michigan			Advisors for Veterans Education	
Ann Arbor, MI	N/A	PC	in the Western U.S.	\$250,000
Respectability			To provide public education and	
Los Angeles, CA	N/A	DC.	advocate for full inclusion of	\$100,000
	I IN/A	l PC	people with disabilities	\$100,000

Respectability			To provide public education and advocate for full inclusion of	
Los Angeles, CA	N/A	PC	people with disabilities	\$200,000
Returning Veterans Project Portland, OR			To provide access to free, confidential therapeutic services	
r ortiana, ort	N/A	PC	for veterans and their families	\$30,000
RightWay Foundation			To provide employment support and trauma-informed mental	
Los Angeles, CA	N/A	PC	health services for foster youth	\$50,000
	,		To provide support for veterans	. ,
Rocky Boy Veterans Center Box Elder, MT			on the Rocky Boy's Indian	
BOX Lider, IVIT	N/A	PC	Reservation and surrounding area	\$50,000
Rocky Mountain Down Syndrome			To provide continuing education	
Association Inc. Denver, CO	N/A	PC	opportunities for adults with  Down syndrome	\$40,000
	1477	1.0	To prevent child abuse and	ψ 10,000
Safe & Sound			support vulnerable families to	
San Francisco, CA	N/A	PC	become healthy and	\$50,000
Safe & Sound			To prevent child abuse and	
San Francisco, CA		20	support vulnerable families to	475.000
,	N/A	PC NC (Foreign	become healthy and stable	\$75,000
Saint Anne's Anglican Church		Public	To support social outreach activities to disadvantaged	
Nassau, Bahamas		Charity	children and adults in Nassau,	
	N/A	Equivalent)	Bahamas	\$30,000
			To provide school to work	
San Antonio Lighthouse for the Blind			transition services and training for young adults with visual	
San Antonio, TX			impairment and/or other	
	N/A	PC	disabilities	\$50,000
San Francisco Court Appointed			To provide foster youth with	
Special Advocate Program	N / A	DC.	trained volunteers who serve as	¢50,000
San Francisco, CA	N/A	PC	advocates and mentors  To provide comprehensive	\$50,000
Sanctuary of Hope			support services to transition-age	
Los Angeles, CA	N/A	PC	youth in South Los Angeles	\$35,000
Sanctuary of Hope			To provide comprehensive	
Los Angeles, CA	N/A	PC	support services to transition-age youth in South Los Angeles	\$35,000
	IN/A	r C		\$33,000
Senior Hub Inc.			To reduce isolation and enhance independence and well-being	
Northglenn, CO	N/A	PC	among older adults	\$30,000
Senior Hub Inc.			To reduce isolation and enhance	
Northglenn, CO			independence and well-being	
Horting.com, CO	N/A	PC	among older adults	\$65,000
Seniors' Resource Center Inc.			To provide basic necessities to	
Denver, CO			clients and increased technology	40= 000
	N/A	PC Poreign	for staff during COVID-19	\$25,000
Seniors Services Society of BC		NC (Foreign Public	To provide housing to homeless	
New Westminster, BC Canada		Charity	elders and services to support	
	N/A	Equivalent)	seniors to age in place	\$27,405
Conjuga Considera Continta of DC		NC (Foreign	To provide hereing to be	
Seniors Services Society of BC New Westminster, BC Canada		Public Charity	To provide housing to homeless elders and services to support	
Tew Westimister, De Canada	N/A	Equivalent)	seniors to age in place	\$60,000
Services & Advocacy for Cay Lockian		-, -, -,	To increase the cultural	. ,
Services & Advocacy for Gay Lesbian Bisexual & Transgender Elders Inc.			competency of organizations	
New York, NY	N/A	PC	serving diverse elders and their caregivers	\$100,000
	11/71	rC		\$100,000
Serving Seniors			To provide basic necessities to clients and increased technology	
San Diego, CA	N/A	PC	for staff during COVID-19	\$16,595
			To provide nutrition and	. ,
Serving Seniors			wraparound supports to	
San Diego, CA	N/A	DC.	homeless and low-income older	Ć100 000
	N/A	PC	adults	\$100,000
Soar For Youth			To support foster youth to	
Berkeley, CA	N/A	PC	graduate from high school and enroll in college	\$40,000
	1		om on moonege	Ş <del>.1</del> 0,000

Southwest Autism Research and			To provide vocational and life	
Resource Center			skills training and support for transitioning adults with autism	
Phoenix, AZ	N/A	PC	spectrum disorder	\$100,000
			To provide inclusive sports and	
Special Olympics Arizona Inc.			fitness opportunities for adults	
Goodyear, AZ			with and without intellectual	
	N/A	PC	disabilities in Arizona, Alaska, and Hawai'i	\$180,000
Special Olympics Texas Inc.			To provide inclusive sports and	
Pflugerville, TX			fitness opportunities for adults	
_	N/A	PC	with and without I/DD in Texas	\$80,000
			To support staffing to maintain, grow, and share with other	
Special Olympics Texas Inc.			Special Olympics chapters COVID-	
Pflugerville, TX			19 safe Unified Sports exercise	
			programs that partner with	
	N/A	PC	seniors in the community	\$40,000
Special Olympics Washington			To provide inclusive sports and	
Seattle, WA	N/A	PC	recreation opportunities for adults with intellectual disabilities	\$75,000
	14/74		To ensure that individuals with	<b>773,000</b>
Charial Degraption Complete Inc			I/DD live quality lives filled with	
Special Recreation Services Inc. Reno, NV			meaningful relationships, skills,	
neno, itt	11/0	DC	and opportunities to learn, work,	¢20.000
Ch. Daniela Canian Cantan after	N/A	PC	and grow	\$30,000
St. Barnabas Senior Center of Los Angeles			To provide nutrition, caregiver	
Los Angeles, CA	N/A	PC	support, and health and wellness programs to low-income elders	\$50,000
St. Barnabas Senior Center of Los	14,71		To provide nutrition, caregiver	φοσ,σσσ
Angeles			support, and health and wellness	
Los Angeles, CA	N/A	PC	programs to low-income elders	\$100,000
St. Madeleine Sophie's Training			To educate and empower adults	
Center			with I/DD to realize their full	
El Cajon, CA	N/A	PC	potential	\$75,000
Store To Door			To provide volunteer-based grocery shopping and delivery,	
Store To Door Portland, OR			and friendly visits to homebound	
Tortiana, on	N/A	PC	elders	\$20,000
			To provide volunteer-based	
Store To Door			grocery shopping and delivery,	
Portland, OR	NI/A	PC	and friendly visits to homebound	¢3E 000
Swords To Plowshares Veterans	N/A	PC	elders  To provide legal services to	\$35,000
Rights Organization			homeless and low-income	
San Francisco, CA	N/A	PC	veterans throughout the Bay Area	\$200,000
Swords To Plowshares Veterans				
Rights Organization			To support a Legal Services Fellow	
San Francisco, CA	N/A	PC	position	\$100,000
			To provide a transition to independent living program for	
Taft College Foundation			post-secondary students with	
Taft, CA			intellectual and developmental	
	N/A	PC	disabilities	\$75,000
Team Rubicon			To support the Clay Hunt	
Los Angeles, CA			Fellowship leadership program	
-	N/A	PC	for transitioning veterans	\$100,000
Team Rubicon Los Angeles, CA	NI/A	DC.	To support the Veterans Coalition	ć=0.000
-	N/A	PC	for Vaccination  To provide services and support	\$50,000
The Arc of San Antonio Inc.			for adults with intellectual and	
San Antonio, TX	N/A	PC	developmental disabilities	\$100,000
The Arc of the United States				
Washington, DC			To support future care planning	
	N/A	PC	for people with disabilities	\$200,000
The Arc of the United States				
Washington, DC	N/A	PC	To support future care planning	\$100.000
	IN/A	NC (Foreign	for people with disabilities	\$100,000
The Canadian National Institute for		Public	To provide post-vision loss career	
the Blind New Westminster, BC Canada		Charity	support for adults in British	
I INCAN ANCOUNTRIBUTED, DC CALIANA	N/A	Equivalent)	Columbia	\$50,000

The Mission Continues St. Louis, MO	N/A	PC	To promote veteran reintegration in the Western U.S. through voluntary community service	\$50,000
The Mission Continues St. Louis, MO	N/A	PC	To promote veteran reintegration in the Western U.S. 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 Pennsylvania State University University Park, PA		601	To develop and pilot a screening tool to identify veterans at highrisk of failure during transition to	4400 000
The Redwoods-A Community of Seniors	N/A	GOV	post-military life  To provide rental assistance to low-income seniors in independent and assisted living	\$100,000
Mill Valley, CA  The Salvation Army - Bahamas	N/A	PC NC (Foreign Public	facilities  To provide individualized	\$35,000
Nassau, Bahamas	N/A	Charity Equivalent)	instruction and skills training to students with visual impairments	\$35,000
The SCAN Foundation Long Beach, CA	N/A	SO II	To support the State with the implementation of the California Master Plan on Aging	\$100,000
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 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 support foster youth to succeed in and graduate from college	\$20,000
The University Corporation San Francisco State San Francisco, CA	N/A	PC	To support foster youth to succeed in and graduate from college	\$40,000
Treehouse Seattle, WA	N/A	PC	To support foster youth to graduate from high school and transition to independence	\$125,000
Trustees of Boston University Boston, MA	N/A	PC	To support the Women Veterans Network program	\$50,000
Twin Cities Public Television Inc. St. Paul, MN	N/A	PC	To provide 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 Friends of the Children Los Angeles, CA	N/A	PC	To provide education support and transitional housing for foster youth	\$50,000
United States Veterans Initiative Los Angeles, CA	N/A	PC	To provide transitional housing and supportive services to homeless women veterans	\$50,000
United States Veterans Initiative Los Angeles, CA	N/A	PC	To provide transitional housing and supportive services to homeless women veterans	\$150,000
University of Delaware Newark, DE	N/A	PC	To identify a collaborative framework for national standards and best practices supporting family future planning	\$55,000
University of Delaware Newark, DE	N/A	PC	To identify a collaborative framework for national standards and best practices supporting family future planning	\$50,000
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	\$130,000

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 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 Victoria Victoria, BC Canada		NC (Foreign Public Charity	To provide customized technologies to improve the quality of life for adults with physical and developmental	4.00.00
	N/A	Equivalent)	disabilities	\$100,000
Urban Peak Denver Denver, CO	N/A	PC	To support Denver's homeless youth and youth at risk of homelessness	\$30,000
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 of unaccompanied refugee minors and their foster families	
Vancouver Community College Foundation Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide vocational education and training for students with developmental disabilities	\$30,000 \$25,000
Vancouver Community College Foundation Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide vocational education and training for students with developmental disabilities	\$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	\$20,000
VTC Enterprises Santa Maria, CA	N/A	PC	To provide life skills and employment training and 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 Santa Ana, CA		PC	To provide supportive services and employment training to low-income veterans and their	
Workshops for Warriors Inc. San Diego, CA	N/A N/A	PC	families in Orange County  To provide vocational skills training and certification to transitioning veterans in San Diego	\$75,000 \$100,000
World Institute on Disability Berkeley, CA			To provide self-directed, online planning tools and information on employment, health coverage options, disability benefits, and	
Yellowstone CASA Inc. Billings, MT	N/A N/A	PC PC	community living  To provide foster youth with trained volunteers to serve as advocates and mentors	\$100,000
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			To ensure children in foster care have the committed and skilled	
Youth Policy Institute of Iowa Scarsdale, NY	N/A N/A	PC PC	care that they need to thrive  2021 Membership Dues	\$95,000
Zero8hundred Inc. San Diego, CA		20	To provide transition assistance, referrals, and support to service members and their families during the transition to civilian	
	N/A	PC	life in San Diego	\$100,000

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
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 options	\$50,000
Banner Alzheimer's Foundation Phoenix, AZ	N/A	PC	To provide culturally competent caregiving tools that serve Native American dementia patients	\$70,000
Bay Area Outreach and Recreation Program			To provide sports, recreation, and outdoor adventures to people with physical and visual	
Berkeley, CA	N/A	PC	disabilities  To provide inclusive, supported employment opportunities in	\$45,000
Best Buddies International Inc. Miami, FL Big Brothers Big Sisters of San Diego	N/A	PC	professional work environments for young adults with I/DD  To provide mentoring support for	\$150,000
County Inc. San Diego, CA	N/A	PC	military children in the San Diego area  To support foster youth to	\$75,000
Cal State Fullerton Philanthropic Foundation Fullerton, CA	N/A	PC	graduate from college and prepare them to thrive after graduation	\$50,000
California Youth Connection Emeryville, CA	N/A	PC	To develop foster youths' leadership and advocacy skills To provide a barrier-free camp	\$125,000
Camp For All Foundation Houston, TX	N/A	PC	experience for adults and transitioning youth with disabilities	\$50,000
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
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 that enables homebound elders to live independently	\$60,000
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
Children Now Oakland, CA	N/A	PC	To support policies and practices that enhance child well-being	\$100,000
Children's Rights Inc. New York, NY	N/A	PC	To ensure 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 for Churchie alumni to study in the United States and United Kingdom	\$75,000
Churchie Foundation Limited East Brisbane, Australia	N/A	NC (Foreign Public Charity Equivalent)	To provide scholarships for Churchie alumni to study in the United States and United Kingdom	\$75,000

Churchie Foundation Limited		NC (Foreign Public Charity	To provide scholarships and financial aid to students at	
East Brisbane, Australia  Churchie Foundation Limited	N/A	Requivalent)  NC (Foreign Public Charity	Anglican Church Grammar School  To provide scholarships and financial aid to students at	\$125,000
East Brisbane, Australia	N/A	Equivalent) NC	Anglican Church Grammar School	\$125,000
Churchie Foundation Limited East Brisbane, Australia	N/A	(Foreign Public Charity Equivalent)	To create an endowment that supports scholarships for Churchie alumni	\$333,000
Churchie Foundation Limited East Brisbane, Australia	N/A	NC (Foreign Public Charity Equivalent)	To create an endowment that supports scholarships for Churchie alumni	\$333,000
Civic Ventures San Francisco, CA	N/A	PC	To create a society that views older adults as valuable intergenerational contributors	\$225,000
Code of Support Foundation Alexandria, VA	N/A	PC	To provide intake, referral, and case coordination services for veterans nationwide	\$100,000
Colorado State University Foundation Fort Collins, CO	N/A	PC	To provide college transition and academic support for students with autism or brain injuries	\$50,000
Community Music Center San Francisco, CA	N/A	PC	To foster community engagement and lifelong learning for older adults through choir participation	\$60,000
Contra Costa Senior Legal Services Concord, CA	N/A	PC	To provide legal assistance to older adults with disabilities or experiencing poverty	\$60,000
Corporation for Supportive Housing Los Angeles, CA	N/A	PC	To advance policies benefitting older adults who are homeless or unnecessarily institutionalized	\$225,000
Council On Quality & Leadership In Supports For People With Disabilities Towson, MD	N/A	PC	To provide leadership training and support for emerging nonprofit leaders of organizations serving adults with I/DD	\$130,000
Denver Indian Family Resource Center Denver, CO	N/A	PC	To support and strengthen 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, transitional housing, and support services to at-risk youth in London	\$100,000
Depaul UK London, United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To provide emergency, transitional housing, and support services to at-risk youth in London	\$100,000
Duet Partners In Health & Aging Inc. Phoenix, AZ	N/A	PC	To provide volunteer-assisted transportation and support to homebound elders	\$60,000
Ecumenical Center for Religion and Health San Antonio, TX	N/A	PC	To provide mental health services to older adults in rural communities in south Texas	\$50,000
Extraordinary Families Los Angeles, CA	N/A	PC	To recruit and support families for foster youth and support youth aging out of foster care	\$100,000
Family Eldercare Inc. Austin, TX	N/A	PC	To help elders age in place through coordination of and connections to needed services	\$120,000
Farmer Veteran Coalition Woodland, CA	N/A	PC	To support veterans pursuing careers in agriculture with mentoring and resources	\$100,000
Food For Thought Forestville, CA	N/A	PC	To provide nutritious, medically tailored meals and food assistance for low-income elders	\$62,500
Fosterclub Seaside, OR	N/A	PC	To connect current and foster youth to resources and support foster youth leaders to advocate for policy change	\$125,000

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
Grant A Gift Autism Foundation Las Vegas, NV	N/A	PC	To provide vocational training for transitioning youth and adults with autism in Nevada	\$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	\$250,000
		NC (Foreign	To be the convener, conduit, and collective public voice for local community agencies serving	
Inclusion BC Society New Westminster, BC Canada	N/A	Public Charity Equivalent)	people with I/DD across British Columbia  To provide necessary supports	\$60,000
Institute On Aging San Francisco, CA	N/A	PC	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 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	\$110,000
Kindering Center Bellevue, WA	N/A	PC	To support the social and emotional development of infants and toddlers in foster care	\$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.			To prepare low-income Bahamian students for high school graduation and post-secondary or	, 2,222
New York, NY	N/A	PC	career technical education  To prepare low-income Bahamian	\$100,000
Lyford Cay Foundation Inc. New York, NY	N/A	PC	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
Marin Brain Injury Network Larkspur, CA	N/A	PC	To provide a continuum of care for individuals with acquired brain injuries and their families	\$100,000
Meals on Wheels Diablo Region Walnut Creek, CA	N/A	PC	To provide community engagement, fall prevention, and care management services to older adults	\$60,000
Military Child Education Coalition Harker Heights, TX	N/A N/A	PC	To support the education of military children worldwide	\$100,000
	196		To provide leadership development and advocacy	\$100,000
Mockingbird Society Seattle, WA	N/A	PC	training to foster and homeless youth	\$95,000
My Possibilities Plano, TX	N/A	PC	To provide employment services and support for adults with I/DD	\$75,000
Na Hoaloha-Maui Interfaith Volunteer Caregivers Wailuku, HI	N/A	PC	To provide trained volunteer support that enables homebound elders to live independently	\$60,000

National Center for Youth Law Oakland, CA	N/A	PC	To improve the educational outcomes of Arizona's foster youth	\$100,000
National Domestic Workers Alliance Inc. New York, NY	N/A	PC	To advance state and federal policies that support caregivers across the lifespan	\$250,000
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 Door Ventures San Francisco, CA	N/A	PC	To prepare youth for success in work and life through 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
Northwest Housing Alternatives Inc. Milwaukie, OR	N/A	PC	To provide housing and services to older adults with low incomes to prevent evictions	\$55,000
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.	N/A	DC.	To provide stable transitional housing and support for wounded, ill, and injured veterans and their	¢100 000
San Antonio, TX	N/A	PC	To enrich the quality of life for adults and transitioning youth	\$100,000
Outdoors For All Foundation Seattle, WA	N/A	PC	with disabilities through outdoor recreation  To provide mental health care for	\$50,000
Recovery Resource Council Fort Worth, TX	N/A	PC	service members, veterans, and their families in North Texas  To provide employment support	\$100,000
RightWay Foundation Los Angeles, CA	N/A	PC	and trauma-informed mental health services 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
Saint Anne's Anglican Church Nassau, 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			To provide school to work transition services and training for young adults with visual impairment and/or other	
San Antonio, TX San Francisco Court Appointed Special Advocate Program	N/A	PC	disabilities  To provide foster youth with trained volunteers who serve as	\$50,000
San Francisco, CA  Sanctuary of Hope	N/A	PC	advocates and mentors  To provide comprehensive support services to transition-age	\$50,000
Los Angeles, CA  Senior Hub Inc.	N/A	PC	youth in South Los Angeles  To reduce isolation and enhance independence and well-being	\$35,000
Northglenn, CO	N/A	PC	among older adults  To support foster youth to	\$65,000
Soar For Youth Berkeley, CA	N/A	PC	graduate from high school and enroll in college	\$40,000

			To provide vocational and life	
Southwest Autism Research and			skills training and support for	
Resource Center Phoenix, AZ	N/A	PC	transitioning adults with autism spectrum disorder	\$100,000
FIIOEIIIX, AZ	IN/A	FC	To provide inclusive sports and	\$100,000
			fitness opportunities for adults	
			with and without intellectual	
Special Olympics Arizona Inc.			disabilities in Arizona, Alaska, and	
Goodyear, AZ	N/A	PC	Hawai'i	\$180,000
			To ensure that individuals with	
			I/DD live quality lives filled with	
			meaningful relationships, skills,	
Special Recreation Services Inc.	N. / A	200	and opportunities to learn, work,	¢20,000
Reno, NV St. Barnabas Senior Center of Los	N/A	PC	and grow To provide nutrition, caregiver	\$30,000
Angeles			support, and health and wellness	
Los Angeles, CA	N/A	PC	programs to low-income elders	\$100,000
			To provide volunteer-based	
			grocery shopping and delivery,	
Store To Door			and friendly visits to homebound	
Portland, OR	N/A	PC	elders	\$35,000
			To support the Clay Hunt	
Team Rubicon			Fellowship leadership program for	4400.000
Los Angeles, CA	N/A	PC	transitioning veterans	\$100,000
The Missian Continues			To promote veteran reintegration	
The Mission Continues	N/A	PC	in the Western U.S. through	\$200,000
St. Louis, MO The National Military Family	IN/A	PC	voluntary community service  To support military spouse	\$200,000
Association Inc.			education and professional	
Alexandria, VA	N/A	PC	training opportunities	\$150,000
Alexandra, VA	1477	1.0	To develop and pilot a screening	<b></b>
			tool to identify veterans at high-	
The Pennsylvania State University			risk of failure during transition to	
University Park, PA	N/A	GOV	post-military life	\$100,000
		NC		
		(Foreign	To provide individualized	
The Salvation Army - Bahamas		Public Charity	instruction and skills training to	
Nassau, Bahamas	N/A	Equivalent)	students with visual impairments	\$35,000
			To prepare Los Angeles' foster	
The UCLA Foundation			youth to successfully apply to and	
Los Angeles, CA	N/A	PC	enroll in college	\$75,000
The University Corporation San			To support foster youth to	
Francisco State			succeed in and graduate from	
San Francisco, CA	N/A	PC	college	\$40,000
			To support foster youth to	
Treehouse			graduate from high school and	
Seattle, WA	N/A	PC	transition to independence	\$125,000
			To provide information and	
Twin Cities Public Television Inc.			resources on healthy aging to	
St. Paul, MN	N/A	PC	older adults nationwide	\$100,000
			To provide transitional housing	
United States Veterans Initiative			and supportive services to	
Los Angeles, CA	N/A	PC	homeless women veterans	\$150,000
			To ensure the interests of foster	
University of San Diego			youth are adequately addressed in	
San Diego, CA	N/A	PC	court and in legislation	\$75,000
- Ca Diego, Gr	11/11	NC NC	Source and in registration	Ş7.5,000
Vancouver Community College		(Foreign	To provide vocational education	
Foundation		Public Charity	and training for students with	
Vancouver, BC Canada	N/A	Equivalent)	developmental disabilities	\$50,000
		,	To provide care management and	,
West Marin Senior Services			supportive services to help rural	
Point Reyes Station, CA	N/A	PC	elders age in place	\$50,000
			To provide supportive services	
			and employment training to low-	
Working Wardrobes For A New Start			income veterans and their families	
Santa Ana, CA	N/A	PC	in Orange County	\$75,000
			To provide vocational skills	
			training and certification to	
Workshops for Warriors Inc.			transitioning veterans in San	
			I Diago	\$100,000
San Diego, CA	N/A	PC	Diego	\$100,000
	N/A N/A	PC PC	To support kinship caregivers in	\$50,000

	,		▶ 3b	\$9,660,500
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

# May and Stanley Smith Charitable Trust

94-6622075 Form 990-PF For Year Ended December 31, 2021

## 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:**

\$14,416

# **Date of Report Received from Grantee:**

12/22/2021 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 12/22/2021 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)).