

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

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













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OMB No 1545-0052  
**2019**  
**Open to Public Inspection**

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

Name of foundation Scully Memorial Foundation		<b>A Employer identification number</b> 46-2014396
Number and street (or P O box number if mail is not delivered to street address) 591 Redwood Highway	Room/suite	<b>B Telephone number (see instructions)</b> (415) 384-2288
City or town, state or province, country, and ZIP or foreign postal code Mill Valley, CA 94941		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <u>745,115,616</u>	<b>J</b> Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis)</i>	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

<b>Part I Analysis of Revenue and Expenses</b> <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)	143,000,000			
	<b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments	5,788,380	5,788,380		
	<b>4</b> Dividends and interest from securities	6,579,215	6,579,215		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	21,835,985			
	<b>b</b> Gross sales price for all assets on line 6a	235,614,188			
	<b>7</b> Capital gain net income (from Part IV, line 2)		21,835,985		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)	-1,276	-1,276			
<b>12 Total.</b> Add lines 1 through 11	177,202,304	34,202,304			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc	97,500			97,500
	<b>14</b> Other employee salaries and wages	37,500			37,500
	<b>15</b> Pension plans, employee benefits	10,901			10,901
	<b>16a</b> Legal fees (attach schedule)	23,297			23,297
	<b>b</b> Accounting fees (attach schedule)	23,800			23,800
	<b>c</b> Other professional fees (attach schedule)	878,927	878,927		
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)	897,542	133,122		
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings				
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (attach schedule)	538,982	534,460		4,522
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	2,508,449	1,546,509		197,520
	<b>25</b> Contributions, gifts, grants paid	82,547,000			82,547,000
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	85,055,449	1,546,509		82,744,520	
<b>27</b> Subtract line 26 from line 12					
<b>a Excess of revenue over expenses and disbursements</b>	92,146,855				
<b>b Net investment income</b> (if negative, enter -0-)		32,655,795			
<b>c Adjusted net income</b> (if negative, enter -0-)					

<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .			
	<b>2</b> Savings and temporary cash investments . . . . .	200,199,655	294,113,965	294,113,965
	<b>3</b> Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .	150,924		
	<b>10a</b> Investments—U S and state government obligations (attach schedule)	37,462,600 	13,603,700	13,603,700
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	2,411,370 	69,332,789	69,332,789
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	49,400,143 	53,370,292	53,370,292
	<b>11</b> Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .	337,734,932 	313,072,321	313,072,321
	<b>14</b> Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)	 1,274,084 	 1,622,549 	 1,622,549	
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	628,633,708	745,115,616	745,115,616	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	146,455	263,231	
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)	 14,553,541 	 10,306,317	
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	14,699,996	10,569,548	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .	613,933,712		
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .			
	<b>27</b> Paid-in or capital surplus, or land, bldg, and equipment fund			
<b>28</b> Retained earnings, accumulated income, endowment, or other funds				
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	613,933,712	734,546,068		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) .	628,633,708	745,115,616		

<b>Part III Analysis of Changes in Net Assets or Fund Balances</b>		
<b>1</b> Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) . . . . .	<b>1</b>	613,933,712
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	92,146,855
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____ 	<b>3</b>	28,465,501
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	734,546,068
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	<b>6</b>	734,546,068

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
<b>1 a</b> Sale of Publicly Traded Securities	P	2000-01-01	2019-12-31
<b>b</b> Realized Gain from Investment Psp	P	2000-01-01	2019-12-31
<b>c</b>			
<b>d</b>			
<b>e</b>			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b> 235,614,188		211,857,884	23,756,304
<b>b</b>		1,920,319	-1,920,319
<b>c</b>			
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
<b>a</b>			23,756,304
<b>b</b>			-1,920,319
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	2	21,835,985
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	68,755,702	595,190,443	0.11552
2017	43,600,977	536,615,495	0.08125
2016	48,155,621	439,758,930	0.10951
2015	17,692,939	305,954,315	0.05783
2014	675,392	186,567,338	0.00362

<b>2</b> Total of line 1, column (d)	2	0.367725
<b>3</b> Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.073545
<b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	659,168,839
<b>5</b> Multiply line 4 by line 3	5	48,478,572
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	6	326,558
<b>7</b> Add lines 5 and 6	7	48,805,130
<b>8</b> Enter qualifying distributions from Part XII, line 4	8	82,744,520

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

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

Table with 11 rows for excise tax calculations. Includes fields for exempt foundations, tax under section 511, subtitle A tax, and total tax due. Total tax due is 138,134.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, political expenditures, and state reporting. Includes Yes/No columns.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-13 regarding controlled entities, donor advised funds, and public inspection requirements.

14 The books are in care of Lori Kulvin Crawford Telephone no (415) 384-2288

Located at 591 Redwood Highway Ste 3250 Mill Valley CA ZIP+4 94941

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year 15

Table with 3 columns: Question, Yes, No. Row 16 regarding interest in foreign countries.

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

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

Main table with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.



**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".**

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

**Part IX-A Summary of Direct Charitable Activities**

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

	Expenses
<b>1</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

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

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities.	<b>1a</b>	334,820,890
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	251,891,421
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	82,494,632
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	669,206,943
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets.	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d.	<b>3</b>	669,206,943
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	10,038,104
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	659,168,839
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	32,958,442

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here  and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6.	<b>1</b>	32,958,442
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5.	<b>2a</b>	326,558
<b>b</b>	Income tax for 2019 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	326,558
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	32,631,884
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	
<b>5</b>	Add lines 3 and 4.	<b>5</b>	32,631,884
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	32,631,884

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	<b>1a</b>	82,744,520
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required).	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	82,744,520
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	<b>5</b>	326,558
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	82,417,962

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



**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
<b>1</b> Distributable amount for 2019 from Part XI, line 7				32,631,884
<b>2</b> Undistributed income, if any, as of the end of 2019				
<b>a</b> Enter amount for 2018 only. . . . .				
<b>b</b> Total for prior years 20___, 20___, 20___				
<b>3</b> Excess distributions carryover, if any, to 2019				
<b>a</b> From 2014. . . . .				
<b>b</b> From 2015. . . . .				
<b>c</b> From 2016. . . . .			19,550,314	
<b>d</b> From 2017. . . . .			16,948,270	
<b>e</b> From 2018. . . . .			39,194,410	
<b>f</b> Total of lines 3a through e. . . . .	75,692,994			
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ <u>82,744,520</u>				
<b>a</b> Applied to 2018, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2019 distributable amount. . . . .				32,631,884
<b>e</b> Remaining amount distributed out of corpus	50,112,636			
<b>5</b> Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6 Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	125,805,630			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .				
<b>e</b> Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
<b>f</b> Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020 . . . . .				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). . . . .				
<b>8</b> Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions). . . . .				
<b>9 Excess distributions carryover to 2020.</b> Subtract lines 7 and 8 from line 6a . . . . .	125,805,630			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2015. . . . .				
<b>b</b> Excess from 2016. . . . .			19,550,314	
<b>c</b> Excess from 2017. . . . .			16,948,270	
<b>d</b> Excess from 2018. . . . .			39,194,410	
<b>e</b> Excess from 2019. . . . .			50,112,636	

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

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

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

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

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

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

**1 Information Regarding Foundation Managers:**

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

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

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

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

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

---

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

---

**c** Any submission deadlines

---

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total . . . . .</b> ▶ <b>3a</b>				82,547,000
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b> ▶ <b>3b</b>				





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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i>				
KIPP Bay Area Schools 1404 Franklin Street Ste 500 Oakland, CA 94612	N/A	PC	General Support	200,000
Making Waves Academy 3045 Research Drive Richmond, CA 94806	N/A	PC	General Support	5,900,000
Horatio Alger Association 99 Canal Center Plaza Ste 320 Alexandria, VA 22314	N/A	PC	General Support	50,000
<b>Total . . . . .</b> ▶ <b>3a</b>				82,547,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Making Waves Foundation 3045 Research Drive Richmond, CA 94806	N/A	POF	Construction	63,780,000
Making Waves Foundation 3045 Research Drive Richmond, CA 94806	N/A	POF	General Support	12,600,000
Starcross Monastic Community 34500 Annapolis Road Annapolis, CA 95412	N/A	PC	General Support	7,000
<b>Total . . . . .</b> ▶ <b>3a</b>				82,547,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
Vietnam Foundation 500 Fifth Street NW Washington, DC 20001	N/A	PC	General Support	10,000
<b>Total . . . . . ▶ 3a</b>				82,547,000



**TY 2019 Accounting Fees Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
Accounting Fees	23,800	0	0	23,800

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

## TY 2019 Expenditure Responsibility Statement

**Name:** Scully Memorial Foundation

**EIN:** 46-2014396

**Software ID:** 19009920

**Software Version:** 2019v5.0

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
Making Waves Foundation	3045 Research Drve Richmond, CA 94806	2019-01-01	76,380,000	Construction and General Support	76,380,000	No	Vanous	2019-12-31	Making Waves Foundation has expended all of the funds granted in 2019. The expenses were verified by reports provided by the recipient. No portion of the funds were diverted from the purpose of the grant(s) to the knowledge of the grantor.

## TY 2019 Investments Corporate Bonds Schedule

**Name:** Scully Memorial Foundation

**EIN:** 46-2014396

**Software ID:** 19009920

**Software Version:** 2019v5.0

### Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
American Express Co Sr 3.0% DTD 2/22/19	1,011,790	1,011,790
Amgen Inc. 3.625% DTD 5/15/12	401,950	401,950
Apple Inc SR Var Rt 2/9/17	655,356	655,356
Citigroup Inc 2.35% DTD 8/2/16	452,660	452,660
Goldman Sachs Group Inc 2.350% DTD 9/27/	903,366	903,366
Morgan Stanley MTB 2.625% DTD 11/17/16	1,365,768	1,365,768
ABBVIE INC 2.500% DTD 05/14/15	1,502,250	1,502,250
American Tower Corp 2.8% DTD 5/7/15	100,287	100,287
Autodesk 3.125% DTD 06/05/15	250,805	250,805
BP CAPITAL MKT PLC 2.315% DTD 02/13/15	1,500,330	1,500,330
Broadcom CRP 2.2% DTD 2/14/18	500,300	500,300
Campbell Soup Co 3.3% DTD 11/17/16	811,712	811,712
CATERPILLAR FINL SVC 2.1 DTD 1/12/17	1,000,020	1,000,020
Charter Communication 3.579% DTD 7/23/16	503,175	503,175
CHEVRON CORP 2.419% DTD 11/17/2015	1,506,585	1,506,585
Constellation Brands Inc 2.7% DTD 5/9/17	404,852	404,852
EOG RESOURCES INC 4.4% DTD 05/20/10	978,612	978,612
Ford Motor Credit Co 2.459% DTD 3/27/15	750,225	750,225
General Motors Fincl 3.2% DTD 7/13/15	502,280	502,280
KRAFT HEINZ FOODS CO 2.800% DTD 7/2/16	194,307	194,307

**Investments Corporate Bonds Schedule**

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
Marriott International 2.3% DTD 6/10/16	602,610	602,610
Molson Coors Brewing Co .25% DTD 9/15/17	184,920	184,920
Regions Financial Corp 3.2% DTD 2/8/16	809,888	809,888
Zimmer Holdings Inc. 2.7% DTD 3/19/15	550,352	550,352
Abbvie inc Sr NTS 3.375% DTD 9/13/16	1,025,680	1,025,680
Alibaba Group Holdings 3.125% DTD 11/25/	815,816	815,816
American Intl Group 3.3% DTD 2/26/16	557,903	557,903
American Tower Corp 3.45% DTD 8/7/14	869,312	869,312
AT&T Inc 3.2% DTD 2/9/17	511,955	511,955
AT&T Inc Sr NTS 3.0% DTD 5/04/15	532,316	532,316
BBVA USA (prev: Compass Bank) Sr Notes 3	1,017,120	1,017,120
Beam Inc 3.25% DTD 5/21/12	815,552	815,552
Becton Dickinson & Co Sr NTS 2.894% DTD	304,857	304,857
Boston Scientific Corp 3.375% DTD 5/12/1	774,150	774,150
Broadcom CRP/CaymN 3.0% DTD 2/14/18	1,014,400	1,014,400
Canadian Natl Resources 3.45% 11/16/11	1,034,957	1,034,957
Capital One NA 2.25% DTD 9/13/16	251,058	251,058
Capitol One Financial Co 4.34% 7/19/111	780,893	780,893
Cardinal Health Inc. 2.616% DTD 6/12/17	1,009,770	1,009,770
Celgene Corp 3.55% DTD 8/12/15	681,437	681,437

**Investments Corporate Bonds Schedule**

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
Cigna Corp 144A 3.9% DTD 10/11/19	1,035,250	1,035,250
Citibank NA Var Rt 5/22/19	752,805	752,805
CVS Health Corp 2.125% DTD 5/25/16	1,001,510	1,001,510
Eastman Chem Co Sr NTS 3.5% DTD 11/6/18	823,444	823,444
Ebay Inc 3.8% DTD 3/9/16	869,064	869,064
Enterprise Products Oper 4.05% 8/24/11	1,042,090	1,042,090
Ford Motor Credit Co 3.219% DTD 1/9/15	352,447	352,447
Goldman Sachs Group Inc 3% DTD 1/26/17	961,685	961,685
HP Enterprise Co Sr NTS VAR Rate DTD 9/1	150,019	150,019
Interpublic Group Cos SR 3.75% 9/21/18	513,780	513,780
Keurig Dr Pepper Snapple Group 2.53% DTD	1,006,320	1,006,320
Kinder Morgan/El Paso Pipeline Part 5%	833,720	833,720
Kraft Heinz Foods Co 3.375% DTD 6/15/18	1,017,560	1,017,560
Lyondellbasell Ind 6% DTD 5/15/12	849,624	849,624
McKesson Corp Sr NTS 3.65% DTD 11/30/18	1,013,910	1,013,910
Mizuho Financial Group 100.5676 DTD 9/11	1,008,420	1,008,420
Moody's Corp Sr NTS 3.25% DTD 6/7/18	651,674	651,674
Netapp Inc 3.375% DTD 6/5/14	914,823	914,823
ONEOK Partners LP 3.375% DTD 9/13/12	1,244,715	1,244,715
Phillips 66 4.3% DTD 10/1/12	1,573,935	1,573,935

**Investments Corporate Bonds Schedule**

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
Republic Services Inc 5.25% DTD 8/2/10	1,060,430	1,060,430
Rockwell Collins Inc. 2.8% DTD 4/10/17	813,744	813,744
Truist/Suntrust Bk 100.2987 DTD7/26/18	501,565	501,565
Verizon Communications 101.5865 3/16/17	1,423,394	1,423,394
Wellpoint Inc 3.7% DTD 8/15/11	1,022,960	1,022,960
William Partners LP 3.6% DTD 3/3/15	1,233,408	1,233,408
Zions Bancorp NA Sr NTS 3.35% DTD 3/4/19	256,420	256,420

**TY 2019 Investments Corporate Stock Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
Liberty Global PLC	11,730,069	11,730,069
Allstate Corp	1,081,804	1,081,804
American Equity Investment	530,450	530,450
Aspen Insurance Hldg Ltd	855,302	855,302
Athene Holding Ltd	496,353	496,353
Bank of America Corp DTD 10/23/14	3,626,325	3,626,325
Capital One Finl Co DTD 5/14/15	2,095,705	2,095,705
Centerpoint Energy Inc DTD 8/22/18	1,491,075	1,491,075
Citigroup Inc DTD 4/25/16	3,158,914	3,158,914
Citigroup Inc DTD 12/13/12	435,625	435,625
Citizens Financial Group	538,783	538,783
Discover Finl Svcs DTD 10/31/17	1,816,425	1,816,425
Fifth Third Bancorp	1,620,249	1,620,249
General Electric Co DTD 1/20/16	1,322,271	1,322,271
General Motors Finl Co DTD 9/20/17	2,152,012	2,152,012
Goldman Sachs Group DTD 4/23/15	1,189,535	1,189,535
Goldman Sachs Group DTD 6/17/19	1,567,550	1,567,550
Goldman Sachs Group DTD 7/27/16	1,397,500	1,397,500
Keycorp Var Rt Perp DTD 9/9/16	2,077,461	2,077,461
Metlife Inc DTD 6/1/15	2,309,366	2,309,366
Morgan Stanley	2,202,255	2,202,255
Morgan Stanley	806,507	806,507
PNC Financial Svc DTD7/27/11	1,704,671	1,704,671
Progressive Corp DTD 3/14/18	698,888	698,888
Regions Financial Corp	266,210	266,210
Regions Financial Corp	2,025,914	2,025,914
St Str Corp DTD 5/21/15	1,886,883	1,886,883
State Street Corp	774,784	774,784
Truist Fin Corp DTD 7/29/19	1,511,875	1,511,875
Truist Fin Corp DTD 12/9/19	1,428,000	1,428,000

**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
US Bancorp	1,031,469	1,031,469
US Bancorp DTD 11/23/15	1,490,919	1,490,919
Voya Financial Inc	1,067,589	1,067,589
Wells Fargo & Co DTD 1/23/15	3,137,250	3,137,250
Vail Resorts	6,156,676	6,156,676
Voya Financial Inc DTD 9/12/18	1,650,125	1,650,125



**TY 2019 Investments Government Obligations Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0**US Government Securities - End  
of Year Book Value:**

13,603,700

**US Government Securities - End  
of Year Fair Market Value:**

13,603,700

**State & Local Government  
Securities - End of Year Book  
Value:****State & Local Government  
Securities - End of Year Fair  
Market Value:**

**TY 2019 Investments - Other Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0**Investments Other Schedule 2**

<b>Category/ Item</b>	<b>Listed at Cost or FMV</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
Bloom Tree Offshore Fd Ltd	FMV	7,342,218	7,342,218
Bluemountain Credit Alt Fund	FMV	2,099,345	2,099,345
Bridgewater Prvt Invst Offshr	FMV	7,631,811	7,631,811
Eton Park Overseas Fd Ltd	FMV	7,500	7,500
Goldentree Offshore Fd Ltd	FMV	177,263	177,263
JPM Inflation Mgd Bd Fd	FMV	12,502,119	12,502,119
Miura Global Fd Ltd	FMV	7,176,795	7,176,795
Monarch Debt Recovry Fd Ltd	FMV	7,083,164	7,083,164
OCH-ZIFF OZOFII Pvt Inv	FMV	7,652,660	7,652,660
Taconic Opp Offshore Fd	FMV	7,419,832	7,419,832
Third Pt Offshore Fd Ltd	FMV	7,357,183	7,357,183
Vanguard FTSE Dev Mkt	FMV	29,890,348	29,890,348
Vanguard FTSE Emrg Mkt	FMV	15,384,619	15,384,619
Vanguard MID-CAP ETF	FMV	45,907,899	45,907,899
Winton Ftrs Fd Ltd	FMV	7,433,422	7,433,422
Matthews Pacific Tiger Inst	FMV	13,516,278	13,516,278
iShares Russell 2000 ETF	FMV	11,669,132	11,669,132
Aristeia International Ltd	FMV	6,116,875	6,116,875
Manner Atlantic Ltd	FMV	6,718,626	6,718,626
PFM Healthcare Offshore Fd	FMV	6,557,785	6,557,785
CRP VIII	FMV	840,208	840,208
Artisan International Fund	FMV	13,629,174	13,629,174
Artisan Intl Value Fd	FMV	20,205,132	20,205,132
Fidelity 500 Index Fd	FMV	56,753,567	56,753,567
iShares MSCI India	FMV	2,794,425	2,794,425
The Canyon Value Realization Fund	FMV	9,175,990	9,175,990
SPO Partners & Co Liquidating Trust-Endw	FMV	17,445	17,445
SPO Partners & Co Liquidating Trust	FMV	11,506	11,506

**TY 2019 Legal Fees Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
Legal Fees	23,297	0	0	23,297

**TY 2019 Other Assets Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Accrued Interest/Dividends	1,236,578	1,582,402	1,582,402
Purchased Interest	37,506	40,147	40,147

**TY 2019 Other Expenses Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank Fees	7,191	7,191		
Dividends paid on Short Positions	522,881	522,881		
Fees and Licenses	4,388	4,388		
Insurance	4,158			4,158
Payroll Service	349			349
Postage & Delivery	15			15

**TY 2019 Other Income Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	526	526	
Partnership Income	-1,802	-1,802	

**TY 2019 Other Liabilities Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0

<b>Description</b>	<b>Beginning of Year - Book Value</b>	<b>End of Year - Book Value</b>
Deferred Excise Tax	108,184	546,046
Short Positions	14,445,357	9,622,137
Excise Tax Payable		138,134

**TY 2019 Other Professional Fees Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
Investment Management Fees	878,927	878,927	0	0



**TY 2019 Taxes Schedule****Name:** Scully Memorial Foundation**EIN:** 46-2014396**Software ID:** 19009920**Software Version:** 2019v5.0

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
Deferred Excise Tax	437,862			
Excise Tax	326,558			
Foreign Tax W/H	133,122	133,122		

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

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

OMB No 1545-0047  
**2019**

Name of the organization  
Scully Memorial Foundation

**Employer identification number**  
46-2014396

**Organization type** (check one)

**Filers of:**

**Section:**

Form 990 or 990-EZ

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

Form 990-PF

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

Check if your organization is covered by the **General Rule** or a **Special Rule**.

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

**General Rule**

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

**Special Rules**

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

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

Name of organization  
Scully Memorial Foundation

Employer identification number  
46-2014396

**Part I** **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Scully 1994 Family Trust No 2 591 Redwood Highway Ste 3250  Mill Valley, CA 94941	\$ 143,000,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions )
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions )
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions )
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions )
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions )
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions )

Name of organization Scully Memorial Foundation	Employer identification number 46-2014396
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<b>Part II Noncash Property</b>			
(a) No. from Part I	(b) Description of noncash property given <small>(see instructions) Use duplicate copies of Part II if additional space is needed</small>	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____

Name of organization  
 Scully Memorial Foundation

Employer identification number  
 46-2014396

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

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

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

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

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