

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

|   |  |   |  |
|---|--|---|--|
| Name of foundation<br>Nancy Buck Ransom Foundation  |  | A Employer identification number<br>94-2601172  |  |
| Number and street (or P.O. box number if mail is not delivered to street address)<br>PO Box 749   |  | B Telephone number (see instructions)<br>(831) 375-3311   |  |
| City or town, state or province, country, and ZIP or foreign postal code<br>Monterey, CA 93942  |  | C If exemption application is pending, check here <input type="checkbox"/>  |  |
| G Check all that apply:<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Initial return of a former public charity<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Name change |  | D 1. Foreign organizations, check here..... <input type="checkbox"/><br>2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/> |  |
| H Check type of organization:<br><input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust<br><input type="checkbox"/> Other taxable private foundation   |  | E If private foundation status was terminated under section 507(b)(1)(A), check here ..... <input type="checkbox"/>   |  |
| I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 44,058,958   |  | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... <input type="checkbox"/>  |  |
| J Accounting method:<br><input type="checkbox"/> Cash<br><input checked="" type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____<br>(Part I, column (d) must be on cash basis.)   |  |   |  |

| Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).) |   | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|---|------------------------------------|---------------------------|-------------------------|---|
| Revenue   | 1 Contributions, gifts, grants, etc., received (attach schedule)  |                                    |                           |                         |   |
|   | 2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B . . . . . |                                    |                           |                         |   |
|   | 3 Interest on savings and temporary cash investments . . . . .  | 114                                | 114                       |                         |   |
|   | 4 Dividends and interest from securities . . . . .  | 1,011,230                          | 1,011,230                 |                         |   |
|   | 5a Gross rents . . . . .  |                                    |                           |                         |   |
|   | b Net rental income or (loss) _____   |                                    |                           |                         |   |
|   | 6a Net gain or (loss) from sale of assets not on line 10 _____  | 217,791                            |                           |                         |   |
|   | b Gross sales price for all assets on line 6a _____   |                                    |                           |                         |   |
|   | 7 Capital gain net income (from Part IV, line 2) . . . . .  |                                    | 217,791                   |                         |   |
|   | 8 Net short-term capital gain . . . . .   |                                    |                           |                         |   |
|   | 9 Income modifications . . . . .  |                                    |                           |                         |   |
|   | 10a Gross sales less returns and allowances _____   |                                    |                           |                         |   |
| Operating and Administrative Expenses   | b Less: Cost of goods sold . . . . .  |                                    |                           |                         |   |
|   | c Gross profit or (loss) (attach schedule) . . . . .  |                                    |                           |                         |   |
|   | 11 Other income (attach schedule) . . . . .   | 5,000                              |                           |                         |   |
|   | 12 Total. Add lines 1 through 11 . . . . .  | 1,234,135                          | 1,229,135                 |                         |   |
|   | 13 Compensation of officers, directors, trustees, etc. . . . .  | 105,000                            | 3,500                     |                         | 101,500   |
|   | 14 Other employee salaries and wages . . . . .  |                                    |                           |                         |   |
|   | 15 Pension plans, employee benefits . . . . .   | 5,250                              |                           |                         | 5,250   |
|   | 16a Legal fees (attach schedule) . . . . .  |                                    |                           |                         |   |
|   | b Accounting fees (attach schedule) . . . . .   | 24,362                             | 3,092                     |                         | 20,483  |
|   | c Other professional fees (attach schedule) . . . . .   | 2,125                              |                           |                         |   |
|   | 17 Interest . . . . .   |                                    |                           |                         |   |
|   | 18 Taxes (attach schedule) (see instructions) . . . . .   | 96,813                             | 9,401                     |                         | 8,052   |
|   | 19 Depreciation (attach schedule) and depletion . . . . .   |                                    |                           |                         |   |
|   | 20 Occupancy . . . . .  | 20,880                             |                           |                         | 20,790  |
|   | 21 Travel, conferences, and meetings . . . . .  | 1,576                              | 154                       |                         | 1,422   |
|   | 22 Printing and publications . . . . .  |                                    |                           |                         |   |
|   | 23 Other expenses (attach schedule) . . . . .   | 235,764                            | 223,529                   |                         | 8,784   |
|   | 24 Total operating and administrative expenses. Add lines 13 through 23 . . . . .                               | 491,770                            | 239,676                   |                         | 166,281   |
|   | 25 Contributions, gifts, grants paid . . . . .  | 2,352,376                          |                           |                         | 2,352,376   |
|   | 26 Total expenses and disbursements. Add lines 24 and 25  | 2,844,146                          | 239,676                   |                         | 2,518,657   |
|   | 27 Subtract line 26 from line 12:   |                                    |                           |                         |   |
|   | a Excess of revenue over expenses and disbursements   | -1,610,011                         |                           |                         |   |
|   | b Net investment income (if negative, enter -0-)  |                                    | 989,459                   |                         |   |
| c Adjusted net income (if negative, enter -0-)  |   |                                    |                           |                         |   |

| Part II Balance Sheets  |  | Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.) |                |                       |
|---|--|--|----------------|-----------------------|
|   |  | Beginning of year  | End of year    |                       |
|   |  | (a) Book Value   | (b) Book Value | (c) Fair Market Value |
| Assets  | 1 Cash—non-interest-bearing . . . . .  |  |                |                       |
|   | 2 Savings and temporary cash investments . . . . .   | 1,127,734  | 1,856,170      | 1,856,170             |
|   | 3 Accounts receivable ▶ _____<br>Less: allowance for doubtful accounts ▶ _____   |  |                |                       |
|   | 4 Pledges receivable ▶ _____<br>Less: allowance for doubtful accounts ▶ _____  |  |                |                       |
|   | 5 Grants receivable . . . . .  |  |                |                       |
|   | 6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .              |  |                |                       |
|   | 7 Other notes and loans receivable (attach schedule) ▶ _____<br>Less: allowance for doubtful accounts ▶ _____                                    |  |                |                       |
|   | 8 Inventories for sale or use . . . . .  |  |                |                       |
|   | 9 Prepaid expenses and deferred charges . . . . .  |  | 65,945         | 65,945                |
|   | 10a Investments—U.S. and state government obligations (attach schedule)  |  |                |                       |
|   | b Investments—corporate stock (attach schedule) . . . . .  |  |                |                       |
|   | c Investments—corporate bonds (attach schedule) . . . . .  |  |                |                       |
|   | 11 Investments—land, buildings, and equipment: basis ▶ _____<br>Less: accumulated depreciation (attach schedule) ▶ _____                         |  |                |                       |
|   | 12 Investments—mortgage loans . . . . .  |  |                |                       |
|   | 13 Investments—other (attach schedule) . . . . .   | 36,834,939   | 34,480,585     | 42,041,776            |
|   | 14 Land, buildings, and equipment: basis ▶ _____<br>Less: accumulated depreciation (attach schedule) ▶ _____                                     |  |                |                       |
| 15 Other assets (describe ▶ _____)  | 123,331  | 95,067   | 95,067         |                       |
| 16 <b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) | 38,086,004   | 36,497,767   | 44,058,958     |                       |
| Liabilities   | 17 Accounts payable and accrued expenses . . . . .   | 113,290  | 60,522         |                       |
|   | 18 Grants payable . . . . .  |  |                |                       |
|   | 19 Deferred revenue . . . . .  |  |                |                       |
|   | 20 Loans from officers, directors, trustees, and other disqualified persons  |  |                |                       |
|   | 21 Mortgages and other notes payable (attach schedule) . . . . .   |  |                |                       |
|   | 22 Other liabilities (describe ▶ _____)  | 21,026   | 90,491         |                       |
|   | 23 <b>Total liabilities</b> (add lines 17 through 22) . . . . .  | 134,316  | 151,013        |                       |
| Net Assets or Fund Balances   | <b>Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/></b><br><b>and complete lines 24, 25, 29 and 30.</b>               |  |                |                       |
|   | 24 Net assets without donor restrictions . . . . .   |  |                |                       |
|   | 25 Net assets with donor restrictions . . . . .  |  |                |                       |
|   | <b>Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/></b><br><b>and complete lines 26 through 30.</b> |  |                |                       |
|   | 26 Capital stock, trust principal, or current funds . . . . .  |  |                |                       |
|   | 27 Paid-in or capital surplus, or land, bldg., and equipment fund  |  |                |                       |
|   | 28 Retained earnings, accumulated income, endowment, or other funds  | 37,951,688   | 36,346,754     |                       |
|   | 29 <b>Total net assets or fund balances</b> (see instructions) . . . . .   | 37,951,688   | 36,346,754     |                       |
| 30 <b>Total liabilities and net assets/fund balances</b> (see instructions) .                         | 38,086,004   | 36,497,767   |                |                       |

| Part III Analysis of Changes in Net Assets or Fund Balances  |   |            |
|--|---|------------|
| 1 Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) . . . . . | 1 | 37,951,688 |
| 2 Enter amount from Part I, line 27a . . . . .   | 2 | -1,610,011 |
| 3 Other increases not included in line 2 (itemize) ▶ _____   | 3 | 5,077      |
| 4 Add lines 1, 2, and 3 . . . . .  | 4 | 36,346,754 |
| 5 Decreases not included in line 2 (itemize) ▶ _____   | 5 |            |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .  | 6 | 36,346,754 |

**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)<br>How acquired<br>P—Purchase<br>D—Donation | (c)<br>Date acquired<br>(mo., day, yr.) | (d)<br>Date sold<br>(mo., day, yr.) |
|--|--|---|---|-------------------------------------|
| <b>1 a</b> Charles Schwab - Details on File  |  | P   | 2019-01-01                              | 2019-12-31                          |
| <b>b</b> Charles Schwab - Details on File  |  | P   | 2019-01-01                              | 2019-12-31                          |
| <b>c</b> Wells Fargo Bank N/A  |  | P   | 2019-01-01                              | 2019-12-31                          |
| <b>d</b>   |  |   |   |                                     |
| <b>e</b>   |  |   |   |                                     |

| (e)<br>Gross sales price | (f)<br>Depreciation allowed<br>(or allowable) | (g)<br>Cost or other basis<br>plus expense of sale | (h)<br>Gain or (loss)<br>(e) plus (f) minus (g) |
|--------------------------|---|--|---|
| <b>a</b> 4,529,966       |   | 3,722,442  | 807,524   |
| <b>b</b> 6,390,553       |   | 6,980,286  | -589,733  |
| <b>c</b> 996,000         |   | 996,000  |   |
| <b>d</b>                 |   |  |   |
| <b>e</b>                 |   |  |   |

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

| (i)<br>F.M.V. as of 12/31/69 | (j)<br>Adjusted basis<br>as of 12/31/69 | (k)<br>Excess of col. (i)<br>over col. (j), if any | (l)<br>Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col.(h)) |
|------------------------------|---|--|---|
| <b>a</b>                     |   |  | 807,524   |
| <b>b</b>                     |   |  | -589,733  |
| <b>c</b>                     |   |  |   |
| <b>d</b>                     |   |  |   |
| <b>e</b>                     |   |  |   |

|   |   |          |         |
|---|---|----------|---------|
| <b>2</b> Capital gain net income or (net capital loss)  | { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 } | <b>2</b> | 217,791 |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0-<br>in Part I, line 8 |   | <b>3</b> | 217,791 |

**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)<br>Base period years Calendar<br>year (or tax year beginning in) | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col. (b) divided by col. (c)) |
|--|--|--|---|
| 2018   | 2,469,659                                | 43,528,190                                   | 0.05674   |
| 2017   | 2,417,911                                | 42,758,779                                   | 0.05655   |
| 2016   | 2,220,934                                | 40,782,202                                   | 0.05446   |
| 2015   | 2,152,576                                | 43,022,745                                   | 0.05003   |
| 2014   | 1,933,719                                | 43,840,429                                   | 0.04411   |

|   |          |            |
|---|----------|------------|
| <b>2</b> Total of line 1, column (d)  | <b>2</b> | 0.261884   |
| <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 | <b>3</b> | 0.052377   |
| <b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5   | <b>4</b> | 41,450,463 |
| <b>5</b> Multiply line 4 by line 3  | <b>5</b> | 2,171,051  |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)   | <b>6</b> | 9,895      |
| <b>7</b> Add lines 5 and 6  | <b>7</b> | 2,180,946  |
| <b>8</b> Enter qualifying distributions from Part XII, line 4   | <b>8</b> | 2,518,657  |

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)**

|           |   |           |        |
|-----------|---|-----------|--------|
| <b>1a</b> | Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1.<br>Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions) |           |        |
| <b>b</b>  | Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .  | <b>1</b>  | 9,895  |
| <b>c</b>  | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)   |           |        |
| <b>2</b>  | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)   | <b>2</b>  |        |
| <b>3</b>  | Add lines 1 and 2. . . . .  | <b>3</b>  | 9,895  |
| <b>4</b>  | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)   | <b>4</b>  |        |
| <b>5</b>  | <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .  | <b>5</b>  | 9,895  |
| <b>6</b>  | Credits/Payments:   |           |        |
| <b>a</b>  | 2019 estimated tax payments and 2018 overpayment credited to 2019   | <b>6a</b> | 75,840 |
| <b>b</b>  | Exempt foreign organizations—tax withheld at source . . . . .   | <b>6b</b> |        |
| <b>c</b>  | Tax paid with application for extension of time to file (Form 8868) . . . . .   | <b>6c</b> |        |
| <b>d</b>  | Backup withholding erroneously withheld . . . . .   | <b>6d</b> |        |
| <b>7</b>  | Total credits and payments. Add lines 6a through 6d. . . . .  | <b>7</b>  | 75,840 |
| <b>8</b>  | Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached.  | <b>8</b>  |        |
| <b>9</b>  | <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . . ▶   | <b>9</b>  |        |
| <b>10</b> | <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . . ▶   | <b>10</b> | 65,945 |
| <b>11</b> | Enter the amount of line 10 to be: <b>Credited to 2020 estimated tax</b> ▶ 10,945 <b>Refunded</b> ▶   | <b>11</b> | 55,000 |

**Part VII-A Statements Regarding Activities**

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

**Part VII-A Statements Regarding Activities** (continued)

|           |   |           |            |           |
|-----------|---|-----------|------------|-----------|
| <b>11</b> | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions. . . . .   | <b>11</b> |            | <b>No</b> |
| <b>12</b> | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions . . . . . | <b>12</b> |            | <b>No</b> |
| <b>13</b> | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>www.nbrfoundation.org</u>                                | <b>13</b> | <b>Yes</b> |           |
| <b>14</b> | The books are in care of ► <u>Lynn Bentaleb</u> Telephone no. ► <u>(831) 375-3311</u>   |           |            |           |

Located at ► PO Box 749 Monterey CA ZIP+4 ► 939420749

|           |   |                          |            |           |
|-----------|---|--------------------------|------------|-----------|
| <b>15</b> | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —check here . . . . .   | <input type="checkbox"/> |            |           |
|           | and enter the amount of tax-exempt interest received or accrued during the year . . . . .   | ► <b>15</b>              |            |           |
| <b>16</b> | At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . . | <b>16</b>                | <b>Yes</b> | <b>No</b> |
|           | See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ►  |                          |            |           |

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


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

|           |   | <b>Yes</b> | <b>No</b> |
|-----------|---|------------|-----------|
| <b>1a</b> | During the year did the foundation (either directly or indirectly):   |            |           |
|           | (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |            |           |
|           | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |            |           |
|           | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |            |           |
|           | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |            |           |
|           | (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |            |           |
|           | (6) Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |            |           |
| <b>b</b>  | If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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 . . . . .   | <b>1b</b>  | <b>No</b> |
|           | Organizations relying on a current notice regarding disaster assistance check here. . . . . ► <input type="checkbox"/>  |            |           |
| <b>c</b>  | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019? . . . . .   | <b>1c</b>  | <b>No</b> |
| <b>2</b>  | 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)):  |            |           |
| <b>a</b>  | At the end of tax year 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |            |           |
|           | If "Yes," list the years ► 20____, 20____, 20____, 20____   |            |           |
| <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.) . . . . .   | <b>2b</b>  |           |
| <b>c</b>  | 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. ► 20____, 20____, 20____, 20____  |            |           |
| <b>3a</b> | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |            |           |
| <b>b</b>  | If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019.) . . . . . | <b>3b</b>  |           |
| <b>4a</b> | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?   | <b>4a</b>  | <b>No</b> |
| <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 2019?   | <b>4b</b>  | <b>No</b> |

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

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

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

| <b>1 List all officers, directors, trustees, foundation managers and their compensation. See instructions</b>  |   |   |   |                                       |
|--|---|---|---|---------------------------------------|
| (a) Name and address   | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
| See Additional Data Table  |   |   |   |                                       |
|  |   |   |   |                                       |
|  |   |   |   |                                       |
|  |   |   |   |                                       |
|  |   |   |   |                                       |
|  |   |   |   |                                       |
| <b>2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."</b>                        |   |   |   |                                       |
| (a) Name and address of each employee paid more than \$50,000  | (b) Title, and average hours per week devoted to position | (c) Compensation                          | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
| NONE   |   |   |   |                                       |
|  |   |   |   |                                       |
|  |   |   |   |                                       |
|  |   |   |   |                                       |
|  |   |   |   |                                       |
|  |   |   |   |                                       |
|  |   |   |   |                                       |
| <b>Total number of other employees paid over \$50,000.</b> . . . . .  |   |   |   |                                       |

**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.

| 1 | Expenses |
|---|----------|
|   |          |
|   |          |
|   |          |
|   |          |
|   |          |
|   |          |
|   |          |
|   |          |
|   |          |
|   |          |

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

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

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

|          |  |           |            |
|----------|--|-----------|------------|
| <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> | 40,133,700 |
| <b>b</b> | Average of monthly cash balances. . . . .  | <b>1b</b> | 1,947,988  |
| <b>c</b> | Fair market value of all other assets (see instructions). . . . .  | <b>1c</b> | 0          |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c). . . . .   | <b>1d</b> | 42,081,688 |
| <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>  | 42,081,688 |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . . | <b>4</b>  | 631,225    |
| <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>  | 41,450,463 |
| <b>6</b> | <b>Minimum investment return.</b> Enter 5% of line 5. . . . .  | <b>6</b>  | 2,072,523  |

**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>  | 2,072,523 |
| <b>2a</b> | Tax on investment income for 2019 from Part VI, line 5. . . . .  | <b>2a</b> | 9,895     |
| <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> | 9,895     |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1. . . . .                                     | <b>3</b>  | 2,062,628 |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions. . . . .   | <b>4</b>  |           |
| <b>5</b>  | Add lines 3 and 4. . . . .   | <b>5</b>  | 2,062,628 |
| <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>  | 2,062,628 |

**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> | 2,518,657 |
| <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>  | 2,518,657 |
| <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>  | 9,895     |
| <b>6</b> | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .   | <b>6</b>  | 2,508,762 |

**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)<br>Corpus | (b)<br>Years prior to 2018 | (c)<br>2018 | (d)<br>2019 |
|--|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2019 from Part XI, line 7  |               |                            |             | 2,062,628   |
| <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. . . . . 43,208   |               |                            |             |             |
| <b>c</b> From 2016. . . . . 233,592  |               |                            |             |             |
| <b>d</b> From 2017. . . . . 322,839  |               |                            |             |             |
| <b>e</b> From 2018. . . . . 394,355  |               |                            |             |             |
| <b>f</b> <b>Total</b> of lines 3a through e. . . . .   | 993,994       |                            |             |             |
| <b>4</b> Qualifying distributions for 2019 from Part XII, line 4: ► \$ 2,518,657   |               |                            |             |             |
| <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. . . . .   |               |                            |             | 2,062,628   |
| <b>e</b> Remaining amount distributed out of corpus  | 456,029       |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2019.<br>(If an amount appears in column (d), the same amount must be shown in column (a).)   |               |                            |             |             |
| <b>6</b> <b>Enter the net total of each column as indicated below:</b>   |               |                            |             |             |
| <b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5   | 1,450,023     |                            |             |             |
| <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</b> <b>Excess distributions carryover to 2020.</b><br>Subtract lines 7 and 8 from line 6a. . . . .  | 1,450,023     |                            |             |             |
| <b>10</b> Analysis of line 9:  |               |                            |             |             |
| <b>a</b> Excess from 2015. . . . . 43,208  |               |                            |             |             |
| <b>b</b> Excess from 2016. . . . . 233,592   |               |                            |             |             |
| <b>c</b> Excess from 2017. . . . . 322,839   |               |                            |             |             |
| <b>d</b> Excess from 2018. . . . . 394,355   |               |                            |             |             |
| <b>e</b> Excess from 2019. . . . . 456,029   |               |                            |             |             |

**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)

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

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

**1 Information Regarding Foundation Managers:**

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

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

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

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

**a** The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

Nancy Buck Ransom Foundation  
Po Box 749  
Monterey, CA 93942  
(831) 375-3311  
grants@nbrfoundation.org

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

Applicants for grants must complete an application which is available on the Foundation's website, nbrfoundation.org, or by requesting it from the Foundation's office.

**c** Any submission deadlines:

The third Friday in February and third Friday in August

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

The Foundation was established to help support Crivitz Youth, Inc. in Crivitz, Wisconsin. The Foundation will also accept grant proposals from Nonprofit Organizations serving youth in Monterey County.

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

| Recipient   | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution | Amount    |
|---|--|--------------------------------------|-------------------------------------|-----------|
| Name and address (home or business)                               |  |                                      |                                     |           |
| <b>a</b> <i>Paid during the year</i><br>See Additional Data Table |  |                                      |                                     |           |
| <b>Total</b> . . . . .  |  |                                      | <b>3a</b>                           | 2,352,376 |
| <b>b</b> <i>Approved for future payment</i>                       |  |                                      |                                     |           |
| <b>Total</b> . . . . .  |  |                                      | <b>3b</b>                           |           |

Enter gross amounts unless otherwise indicated.

| 1  | Program service revenue:   | (a)<br>Business code | (b)<br>Amount | (c)<br>Exclusion code | (d)<br>Amount | (See instructions.) |
|----|--|----------------------|---------------|-----------------------|---------------|---------------------|
| a  | _____  |                      |               |                       |               |                     |
| b  | _____  |                      |               |                       |               |                     |
| c  | _____  |                      |               |                       |               |                     |
| d  | _____  |                      |               |                       |               |                     |
| e  | _____  |                      |               |                       |               |                     |
| f  | _____  |                      |               |                       |               |                     |
| g  | Fees and contracts from government agencies  |                      |               |                       |               |                     |
| 2  | Membership dues and assessments. . . .   |                      |               |                       |               |                     |
| 3  | Interest on savings and temporary cash investments . . . . .   |                      |               | 14                    | 114           |                     |
| 4  | Dividends and interest from securities. . . .  |                      |               | 14                    | 1,011,230     |                     |
| 5  | Net rental income or (loss) from real estate:  |                      |               |                       |               |                     |
| a  | Debt-financed property. . . . .  |                      |               |                       |               |                     |
| b  | Not debt-financed property. . . . .  |                      |               |                       |               |                     |
| 6  | Net rental income or (loss) from personal property   |                      |               |                       |               |                     |
| 7  | Other investment income. . . . .   |                      |               |                       |               |                     |
| 8  | Gain or (loss) from sales of assets other than inventory . . . . .   |                      |               |                       |               | 217,791             |
| 9  | Net income or (loss) from special events:  |                      |               |                       |               |                     |
| 10 | Gross profit or (loss) from sales of inventory   |                      |               |                       |               |                     |
| 11 | Other revenue:   |                      |               |                       |               |                     |
| a  | Return of Grant _____  |                      |               |                       |               | 5,000               |
| b  | _____  |                      |               |                       |               |                     |
| c  | _____  |                      |               |                       |               |                     |
| d  | _____  |                      |               |                       |               |                     |
| e  | _____  |                      |               |                       |               |                     |
| 12 | Subtotal. Add columns (b), (d), and (e). .   |                      |               |                       | 1,011,344     | 222,791             |
| 13 | <b>Total.</b> Add line 12, columns (b), (d), and (e). . . . .<br>(See worksheet in line 13 instructions to verify calculations.) |                      |               |                       |               | <b>1,234,135</b>    |

[illegible]

## Part XVII

- |  |  |     |    |
|--|--|-----|----|
|  |  | Yes | No |
|--|--|-----|----|

- |  |  |  |
|--|--|--|
|  |  |  |
|--|--|--|

- |       |  |    |
|-------|--|----|
| 1a(1) |  | No |
| 1a(2) |  | No |

- |  |  |  |
|--|--|--|
|  |  |  |
|--|--|--|

- |              |           |
|--------------|-----------|
| <b>1b(1)</b> | <b>No</b> |
|--------------|-----------|

- |              |  |           |
|--------------|--|-----------|
| <b>1b(2)</b> |  | <b>No</b> |
|--------------|--|-----------|

- |              |  |           |
|--------------|--|-----------|
| <b>1b(3)</b> |  | <b>No</b> |
|--------------|--|-----------|

- |              |  |           |
|--------------|--|-----------|
| <b>1b(4)</b> |  | <b>No</b> |
|--------------|--|-----------|

- |              |           |
|--------------|-----------|
| <b>1b(5)</b> | <b>No</b> |
|--------------|-----------|

- |              |  |           |
|--------------|--|-----------|
| <b>1b(6)</b> |  | <b>No</b> |
|--------------|--|-----------|

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

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- b** If "Yes," complete the following schedule.

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

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

\*\*\*\*\*

Title

**Paid  
Preparer  
Use Only**

| Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation |   |   |   |                                       |
|--|---|---|---|---------------------------------------|
| (a) Name and address   | Title, and average hours per week (b) devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | Expense account, (e) other allowances |
| Lucinda Buck Ewing   | Chair<br>1.00   | 0   |   |                                       |
| PO Box 749<br>Monterey, CA 93942   |   |   |   |                                       |
| Richard Arentz   | Vice Chair<br>1.00  | 0   |   |                                       |
| PO Box 749<br>Monterey, CA 93942   |   |   |   |                                       |
| Lynn Bentaleb  | Sec/Exec Dir<br>40.00                                     | 105,000                                   | 5,250   |                                       |
| PO Box 749<br>Monterey, CA 93942   |   |   |   |                                       |
| Carmen GII   | Member<br>1.00  | 0   |   |                                       |
| PO Box 749<br>Monterey, CA 93942   |   |   |   |                                       |
| Carol Kolb   | Treasurer<br>5.00   | 0   |   |                                       |
| PO Box 749<br>Monterey, CA 93942   |   |   |   |                                       |
| Teri Belli   | Member<br>1.00  | 0   |   |                                       |
| PO Box 749<br>Monterey, CA 93942   |   |   |   |                                       |
| Bill Doolittle   | Member<br>1.00  | 0   |   |                                       |
| PO Box 749<br>Monterey, CA 93942   |   |   |   |                                       |
| Tobi Marcus  | Member<br>1.00  | 0   |   |                                       |
| PO Box 749<br>Monterey, CA 93942   |   |   |   |                                       |

| 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>   |   |                                |   |           |
| Crivitz Youth IncPO BOX 188<br>Crivitz, WI 54114   | None  | PF                             | Operating Support   | 1,051,376 |
| Action Council of Monterey County<br>295 Main Street Ste 300<br>Salinas, CA 93901                        | None  | PC                             | Urban Arts Collaborative                                    | 10,000    |
| Action Council of Monterey County<br>295 Main Street Ste 300<br>Salinas, CA 93901                        | None  | PC                             | Fiscal Sponsor for Greenfield<br>Community Science Workshop | 15,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |   | 2,352,376 |

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

| Recipient   | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution        | Amount    |
|---|--|--------------------------------------|--|-----------|
| Name and address (home or business)   |  |                                      |  |           |
| <b>a</b> <i>Paid during the year</i>  |  |                                      |  |           |
| ARIEL Theatrical IncPO BOX 1268<br>Salinas, CA 93902                                  | None   | PC                                   | Operating Support                          | 15,000    |
| Arts Council for Monterey County<br>1123 Fremont Boulevard Ste C<br>Seaside, CA 93955 | None   | PC                                   | Arts Education & Leadership<br>Programming | 15,000    |
| Arts Council of Santa Cruz County<br>1070 River Street<br>Santa Cruz, CA 95060        | None   | PC                                   | Mariposa's Art                             | 10,000    |
| <b>Total . . . . .</b> ▶ <b>3a</b>  |  |                                      |  | 2,352,376 |



| 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>   |   |                                |  |           |
| Big Sur Land TrustPO BOX 4071<br>Monterey, CA 93942  | None  | PC                             | Youth outdoor programs at Glen Deven and Marks Ranch | 25,000    |
| Boy Scouts of America 55 Silicon Va<br>970 W Julian Street<br>San Jose, CA 95126                         | None  | PC                             | Operating Support for Monterey Bay Council           | 15,000    |
| Boys and Girls Club of Monterey Cou<br>1332 LaSalle Ave<br>Seaside, CA 93955                             | None  | PC                             | Operating Support                                    | 50,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |  | 2,352,376 |

| 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>   |   |                                |                                      |           |
| Carmel Bach FestivalPO BOX 575<br>Carmel, CA 93921   | None  | PC                             | Crossing Cultures and Sing Out Loud! | 10,000    |
| Central Coast YMCA500 Lincoln Ave<br>Salinas, CA 93901   | None  | PC                             | Youth Fit 4 Life Program             | 30,000    |
| Community Partnership for Youth<br>PO BOX 42<br>Monterey, CA 93942                                       | None  | PC                             | Operating Support                    | 40,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                      | 2,352,376 |

| 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>   |   |                                |                                       |           |
| CASA of Monterey County Inc<br>945 South Main St<br>Salinas, CA 93901                                    | None  | PC                             | Operating Support                     | 35,000    |
| Digital NEST Inc1961 Main St 221<br>Watsonville, CA 95076  | None  | PC                             | Operating Support for Salinas Program | 20,000    |
| El Sistema USASalinas Inc<br>820 Park Row 672<br>Salinas, CA 93901                                       | None  | PC                             | Operating Support                     | 30,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                       | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |                                  |           |
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| 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>   |   |                                |                                  |           |
| Fndn for Monterey County Free Libra<br>450 Lincoln Ave 203<br>Salinas, CA 93901                          | None  | PC                             | Summer Camp Scholarships         | 20,000    |
| Friends of MAOS at Monterey High Sc<br>PO BOX 3212<br>Monterey, CA 93942                                 | None  | PC                             | Operational Support              | 7,000     |
| Girl Scouts of California Central C<br>1500 Palma Drive 100<br>Ventura, CA 93001                         | None  | PC                             | Girl scout leadership experience | 25,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                  | 2,352,376 |

| 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>   |   |                                |                                  |           |
| Girls Inc of the Central Coast<br>318 Cayuga St Ste 101A<br>Salinas, CA 93901                            | None  | PC                             | Operating Support                | 30,000    |
| Intl School of Monterey Foundation<br>1720 Yosemite St<br>Seaside, CA 93955                              | None  | SO III FI                      | ISM Family Share                 | 10,000    |
| Jacob's Heart Children's Cancer Sup<br>680 West Beach St<br>Watsonville, CA 95076                        | None  | PC                             | Teen support and peer mentorship | 5,000     |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                  | 2,352,376 |

| 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>   |   |                                |                                  |           |
| Lyceum of Monterey County<br>1073 Sixth Street<br>Monterey, CA 93940                                     | None  | PC                             | Operating Support                | 15,000    |
| MEarthPO BOX 223702<br>Carmel, CA 93922  | None  | PC                             | Operating Support                | 15,000    |
| Monterey County Rape Crisis Center<br>PO BOX 2630<br>Monterey, CA 93942                                  | None  | PC                             | Sexual violence prevention clubs | 25,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                  | 2,352,376 |

| 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>   |   |                                |  |           |
| MY Museum425 Washington St<br>Monterey, CA 93940   | None  | PC                             | Operating Support                              | 20,000    |
| Monterey Jazz FestivalPO BOX JAZZ<br>Monterey, CA 93942  | None  | PC                             | Operating support for youth education programs | 15,000    |
| Olinga LearningPO BOX 1705<br>Gonzales, CA 93926   | None  | PC                             | Wings of Knowledge                             | 10,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |  | 2,352,376 |

| 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>   |   |                                |  |           |
| Pacific Repertory Theatre<br>PO BOX 222035<br>Carmel, CA 93922   | None  | PC                             | School of dramatic arts & tix4kids project | 20,000    |
| Rancho Cielo Youth Campus<br>PO BOX 6948<br>Salinas, CA 93912  | None  | PC                             | Operating Support                          | 20,000    |
| Read-to-Me Project32 Live Oak Lane<br>Carmel Valley, CA 93924  | None  | PC                             | Operating Support                          | 15,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |  | 2,352,376 |



| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |                                       |           |
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| 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>   |   |                                |                                       |           |
| Restorative Justice Partners Inc<br>229 Reindollar Ave B<br>Marina, CA 93933                             | None  | PC                             | Restorative Justice in Schools        | 15,000    |
| Sol Treasures519 Broadway St<br>King City, CA 93930  | None  | PC                             | SOL-O Youth Strings Orchestra Program | 15,000    |
| Spector Dance3343 Paul Davis Dr<br>Marina, CA 93933  | None  | PC                             | Dance On-site                         | 15,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                       | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |                                  |           |
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| Name and address (home or business)  |   |                                |                                  |           |
| <b>a</b> <i>Paid during the year</i>   |   |                                |                                  |           |
| Ventana Wildlife Society<br>19045 Portola Dr Ste F-1<br>Salinas, CA 93908                                | None  | PC                             | Natural science discovery camps  | 20,000    |
| Village ProjectPO Box 127<br>Seaside, CA 93955   | None  | PC                             | Operating Support                | 15,000    |
| Youth Arts Collective Inc<br>472 Calle Principal<br>Monterey, CA 93940                                   | None  | PC                             | Operating Support                | 30,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                  | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |                                    |           |
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| 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>   |   |                                |                                    |           |
| Youth Music Monterey<br>546 Hartnell St Ste B<br>Monterey, CA 93940                                      | None  | PC                             | Operating Support                  | 15,000    |
| ACTION Council of Monterey County<br>295 Main St Ste 300<br>Salinas, CA 93901                            | None  | PC                             | As fiscal sponsor for Palenke Arts | 15,000    |
| Carl Cherry CenterPO BOX 863<br>Carmel, CA 93921   | None  | PC                             | High School Poetry Awards          | 10,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                    | 2,352,376 |

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| Name and address (home or business)  |   |                                |                                  |           |
| <b>a</b> <i>Paid during the year</i>   |   |                                |                                  |           |
| Coastal Kids Home Care<br>1172 S Main St 125<br>Salinas, CA 93901  | None  | PC                             | Clinic on wheels                 | 15,000    |
| Community Human Services<br>PO BOX 3076<br>Monterey, CA 93942  | None  | PC                             | Safe Place                       | 25,000    |
| Elkhorn Slough FoundationPO BOX 267<br>Moss Landing, CA 95039  | None  | PC                             | Outdoor classroom expansion      | 10,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                  | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |                                  |           |
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| Name and address (home or business)  |   |                                |                                  |           |
| <b>a</b> <i>Paid during the year</i>   |   |                                |                                  |           |
| Epicenter of Monterey<br>20 Maple St<br>Salinas, CA 93901  | None  | PC                             | Operating Support                | 25,000    |
| Gil Basketball Academy<br>1522 Constitution Blvd 213<br>Salinas, CA 93905                                | None  | PC                             | Youth basketball programs        | 10,000    |
| Harmony at Home<br>3785 Via Nona Marie Ste 300<br>Carmel, CA 93923                                       | None  | PC                             | Operating Support                | 20,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                  | 2,352,376 |

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| Name and address (home or business)  |   |                                |   |           |
| <b>a</b> <i>Paid during the year</i>   |   |                                |   |           |
| Hope Horses Kids1218 Padre Drive<br>Salinas, CA 93901  | None  | PC                             | Operating Support                                     | 7,000     |
| Josephine Kernes Memorial Pool<br>15 Portola Ave<br>Monterey, CA 93940                                   | None  | PC                             | Adaptive Aquatics for children with disabilities      | 10,000    |
| Loaves Fishes Computers Inc<br>938 S Main St<br>Salinas, CA 93901  | None  | PC                             | Digital Literacy Initiatives for Children and Parents | 15,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |   | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |                                  |           |
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| Name and address (home or business)  |   |                                |                                  |           |
| <b>a</b> <i>Paid during the year</i>   |   |                                |                                  |           |
| Monterey County Ag Rural Life Museu<br>PO BOX 644<br>King City, CA 93930                                 | None  | PC                             | Educational Program              | 13,000    |
| Monterey County Symphony Associatio<br>2560 Garden Rd Ste 101<br>Monterey, CA 93940                      | None  | PC                             | Music for the Schools            | 15,000    |
| Monterey Peninsula College Foundati<br>980 Fremont St<br>Monterey, CA 93940                              | None  | PC                             | Evans College incentive program  | 20,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                  | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |   |           |
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| Name and address (home or business)  |   |                                |   |           |
| <b>a</b> <i>Paid during the year</i>   |   |                                |   |           |
| Pacific Grove Museum of Natural His<br>165 Forest Ave<br>Pacific Grove, CA 93950                         | None  | PC                             | STREAM into the Salinas Valley          | 10,000    |
| National Steinbeck Center1 Main Street<br>Salinas, CA 93901  | None  | PC                             | Steinbeck Young Authors - Middle School | 5,000     |
| Raising a Reader<br>330 Twin Dolphin Drive 147<br>Redwood City, CA 94065                                 | None  | SO I                           | Raising a Reader 3.0 m: Monterey        | 15,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |   | 2,352,376 |



| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |  |           |
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| Name and address (home or business)  |   |                                |  |           |
| <b>a</b> <i>Paid during the year</i>   |   |                                |  |           |
| Senior Council of S C S B Counties<br>234 Santa Cruz Ave<br>Aptos, CA 95003                              | None  | PC                             | Foster grandparent program             | 20,000    |
| Sun Street Centers11 Peach Drive<br>Salinas, CA 93901  | None  | PC                             | Safe Teens Empowerment Program (STEPS) | 20,000    |
| Sunset Cultural CenterPO BOX 1950<br>Carmel, CA 93921  | None  | PC                             | Arts-in-Education                      | 20,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |  | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |                                       |           |
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| <b>a</b> <i>Paid during the year</i>   |   |                                |                                       |           |
| Teen Success Inc508 Valley Way<br>Milpitas, CA 95035   | None  | PC                             | Salinas Teen Success, Inc.<br>Program | 10,000    |
| The Parenting ConnectionPO BOX 1052<br>Marina, CA 93933  | None  | PC                             | Operating Support                     | 30,000    |
| Boys and Girls Clubs of Monterey Co<br>1332 LaSalle Ave<br>Seaside, CA 93955                             | None  | PC                             | OBO Girls Health in Girls Hands       | 15,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                       | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |                                  |           |
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| <b>a</b> <i>Paid during the year</i>   |   |                                |                                  |           |
| Center for Community Advocacy<br>22 W Gabilan Street<br>Salinas, CA 93901                                | None  | PC                             | Youth for Change (Y4C)           | 15,000    |
| Future Citizens Foundation<br>945 South Main Street Ste 210<br>Salinas, CA 93901                         | None  | PC                             | Summer Camp Scholarships         | 10,000    |
| Hijos Del Sol Arts Productions<br>1522 Constitution Blvd 187<br>Salinas, CA 93905                        | None  | PC                             | Arts for All                     | 10,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                  | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |                                  |           |
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| <b>a</b> <i>Paid during the year</i>   |   |                                |                                  |           |
| Kidpower Teenpower Fullpower<br>PO Box 1212<br>Santa Cruz, CA 95061                                      | None  | GROUP                          | Starting Strong                  | 5,000     |
| King City Boxing ClubPO Box 270<br>King City, CA 93930   | None  | PC                             | Operating Support                | 5,000     |
| Monterey Bay Salmon and Trout Proje<br>101 Cooper Street Suite 246<br>Santa Cruz, CA 95060               | None  | PC                             | STEP to the Sea, Monterey County | 6,000     |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |                                  | 2,352,376 |

| 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>   |   |                                |  |           |
| Planned Parenthood Mar Monte<br>1746 The Alameda<br>San Jose, CA 95126                                   | None  | PC                             | Peer Leadership Program of Monterey County | 10,000    |
| Special Kids Crusade<br>1900 Garden Rd Ste 230<br>Monterey, CA 93940                                     | None  | PC                             | Operating Support                          | 20,000    |
| Watsonville Wetlands Watch<br>PO Box 1239<br>Freedom, CA 95019   | None  | PC                             | Environmental Literacy in Pajaro Valley    | 10,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |  | 2,352,376 |

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|--|---|--------------------------------|--|-----------|
| 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>   |   |                                |  |           |
| Action Council of Monterey County<br>295 Main Street Ste 300<br>Salinas, CA 93901                        | None  | PC                             | Fiscal Sponsor for Artists Ink                                     | 5,000     |
| Action Council of Monterey County<br>295 Main Street Ste 300<br>Salinas, CA 93901                        | None  | PC                             | Fiscal Sponsor for Building Healthy Communities                    | 10,000    |
| Action Council of Monterey County<br>295 Main St Ste 300<br>Salinas, CA 93901                            | None  | PC                             | Fiscal Sponsor for Monterey County Health Dept. - Postpone Program | 10,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |  | 2,352,376 |

| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |   |           |
|--|---|--------------------------------|---|-----------|
| Recipient  | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution                            | Amount    |
| Name and address (home or business)  |   |                                |   |           |
| <b>a</b> <i>Paid during the year</i>   |   |                                |   |           |
| Boys and Girls Clubs of Monterey Co<br>1322 La Salle Ave<br>Seaside, CA 93955                            | None  | PC                             | Teen Center Capital Improvement                             | 50,000    |
| Catholic Charities Diocese of Monte<br>922 Hilby Ave<br>Seaside, CA 93955                                | None  | PC                             | Immigration Services for Deferred Action Childhood Arrivals | 10,000    |
| Friend of Olympia Station dba Tandy<br>PO BOX 633<br>Santa Cruz, CA 95061                                | None  | PC                             | ArtSmart Monterey County                                    | 8,000     |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |   | 2,352,376 |

| 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>   |   |                                |   |           |
| Marina Youth ArtsPO BOX 751<br>Marina, CA 93933  | None  | PC                             | After School arts at Los Arboles Middle and Marina High Schools | 5,000     |
| Salvation Army SalinasPO BOX 1570<br>Salinas, CA 93906   | None  | PC                             | Red Shield Club After-School Program                            | 10,000    |
| Seneca Family of Agencies124 River Rd<br>Salinas, CA 93908   | None  | PC                             | Operating Support   | 20,000    |
| <b>Total . . . . .</b> ► <b>3a</b>   |   |                                |   | 2,352,376 |



| Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment |   |                                |   |           |
|--|---|--------------------------------|---|-----------|
| Recipient  | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution                        | Amount    |
| Name and address (home or business)  |   |                                |   |           |
| <b>a</b> <i>Paid during the year</i>   |   |                                |   |           |
| The Wahine Project<br>PO BOX 51204<br>Pacific Grove, CA 93950  | None  | PC                             | Operating Support                                       | 5,000     |
| United Way Monterey County<br>60 Garden Rd Ste 350<br>Monterey, CA 93940                                 | None  | PC                             | Access to Quality and Affordable Early Care & Education | 15,000    |
| Ventana Wilderness Alliance<br>PO BOX 506<br>Santa Cruz, CA 95061  | None  | PC                             | Youth in Wilderness Program                             | 10,000    |
| <b>Total . . . . . ▶ 3a</b>  |   |                                |   | 2,352,376 |

**TY 2019 Accounting Fees Schedule****Name:** Nancy Buck Ransom Foundation**EIN:** 94-2601172**Software ID:** 19009920**Software Version:** 2019v5.0

| Category        | Amount | Net Investment<br>Income | Adjusted Net<br>Income | Disbursements<br>for Charitable<br>Purposes |
|-----------------|--------|--------------------------|------------------------|---|
| Accounting Fees | 4,658  | 3,092                    | 0                      | 779   |
| Audit Fees      | 19,704 | 0                        | 0                      | 19,704                                      |

**TY 2019 Other Assets Schedule****Name:** Nancy Buck Ransom Foundation**EIN:** 94-2601172**Software ID:** 19009920**Software Version:** 2019v5.0**Other Assets Schedule**

| Description      | Beginning of Year -<br>Book Value | End of Year - Book<br>Value | End of Year - Fair<br>Market Value |
|------------------|-----------------------------------|-----------------------------|------------------------------------|
| Accrued Interest | 123,331                           | 95,067                      | 95,067                             |

**TY 2019 Other Expenses Schedule****Name:** Nancy Buck Ransom Foundation**EIN:** 94-2601172**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              | 92                             |                       |                     | 92                                    |
| Dues & Subscriptions   | 750                            |                       |                     | 750                                   |
| Insurance              | 4,051                          |                       |                     | 600                                   |
| Investment Fees        | 361                            | 361                   |                     |                                       |
| Management Fees        | 223,168                        | 223,168               |                     |                                       |
| Office Expense         | 2,557                          |                       |                     | 2,557                                 |
| Telephone              | 4,560                          |                       |                     | 4,560                                 |
| Training & Development | 225                            |                       |                     | 225                                   |

**TY 2019 Other Income Schedule****Name:** Nancy Buck Ransom Foundation**EIN:** 94-2601172**Software ID:** 19009920**Software Version:** 2019v5.0**Other Income Schedule**

| Description     | Revenue And<br>Expenses Per Books | Net Investment<br>Income | Adjusted Net Income |
|-----------------|-----------------------------------|--------------------------|---------------------|
| Return of Grant | 5,000                             |                          |                     |

**TY 2019 Other Increases Schedule****Name:** Nancy Buck Ransom Foundation**EIN:** 94-2601172**Software ID:** 19009920**Software Version:** 2019v5.0

| Description                      | Amount |
|----------------------------------|--------|
| Investment Cost Basis Adjustment | 5,077  |

**TY 2019 Other Liabilities Schedule****Name:** Nancy Buck Ransom Foundation**EIN:** 94-2601172**Software ID:** 19009920**Software Version:** 2019v5.0

| Description                   | Beginning of Year<br>- Book Value | End of Year -<br>Book Value |
|-------------------------------|-----------------------------------|-----------------------------|
| Deferred Excise Tax Liability | 21,026                            | 90,491                      |

**TY 2019 Other Professional Fees Schedule****Name:** Nancy Buck Ransom Foundation**EIN:** 94-2601172**Software ID:** 19009920**Software Version:** 2019v5.0

| <b>Category</b>  | <b>Amount</b> | <b>Net Investment<br/>Income</b> | <b>Adjusted Net<br/>Income</b> | <b>Disbursements<br/>for Charitable<br/>Purposes</b> |
|------------------|---------------|----------------------------------|--------------------------------|--|
| Contract Service | 2,125         | 0                                | 0                              | 0  |



**TY 2019 Taxes Schedule****Name:** Nancy Buck Ransom Foundation**EIN:** 94-2601172**Software ID:** 19009920**Software Version:** 2019v5.0

| Category               | Amount | Net Investment<br>Income | Adjusted Net<br>Income | Disbursements<br>for Charitable<br>Purposes |
|------------------------|--------|--------------------------|------------------------|---|
| Deferred Excise Tax    | 69,465 |                          |                        |   |
| Federal Excise Tax     | 9,895  |                          |                        |   |
| Foreign Investment Tax | 9,079  | 9,079                    |                        |   |
| Payroll Tax            | 8,194  | 322                      |                        | 7,872                                       |
| State Filing Fees      | 180    |                          |                        | 180   |