

Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return of Private Foundation  
or Section 4947(a)(1) Trust Treated as Private Foundation**

- Do not enter social security numbers on this form as it may be made public.  
► Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No 1545 0052

**2018**

Open to Public Inspection

For calendar year 2018 or tax year beginning , 2018, and ending

**COLBURN FOUNDATION**  
6311 ROMAINE STREET, SUITE 7138  
LOS ANGELES, CA 90038

**A** Employer identification number  
95-4693145

**B** Telephone number (see instructions)  
323-464-4640

**C** If exemption application is pending, check here ► ☐ **6**

**D 1** Foreign organizations, check here ► ☐

**2** Foreign organizations meeting the 85% test, check here and attach computation ► ☐

**E** If private foundation status was terminated under section 507(b)(1)(A), check here ► ☐

**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► ☐

**G** Check all that apply: ☐ Initial return ☐ Initial return of a former public charity  
☐ Final return ☐ Amended return  
☐ Address change ☐ Name change

**H** Check type of organization: ☒ Section 501(c)(3) exempt private foundation **04**  
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

**I** Fair market value of all assets at end of year (from Part II, column (c), line 16) **\$ 157,951,291.**  
**J** Accounting method ☐ Cash ☒ Accrual  
☐ Other (specify) \_\_\_\_\_ (Part I, column (d) must be on cash basis.)

<b>Part I Analysis of Revenue and Expenses</b> (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)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments			N/A	
	<b>4</b> Dividends and interest from securities	2,421,612.	3,918,486.		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	5,783,104.			
	<b>b</b> Gross sales price for all assets on line 6a				
	<b>7</b> Capital gain net income (from Part IV, line 2)		9,789,188.		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less: Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)					
<b>See Statement 1</b>		1,629.	1,929,293.		
<b>12 Total</b> Add lines 1 through 11		8,206,345.	15,636,967.		
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc.	24,000.			24,000.
	<b>14</b> Other employee salaries and wages	40,490.			40,490.
	<b>15</b> Pension plans, employee benefits	1,620.			1,620.
	<b>16a</b> Legal fees (attach schedule) <b>See St 2</b>	11,000.			11,000.
	<b>b</b> Accounting fees (attach sch) <b>See St 3</b>	50,000.			50,000.
	<b>c</b> Other professional fees (attach sch) <b>See St 4</b>	1,517,690.	266,464.		51,790.
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instrs) <b>See Stm 5</b>	57,660.	61,502.		3,210.
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings	401.			401.
	<b>22</b> Printing and publications	384.			384.
	<b>23</b> Other expenses (attach schedule)				
	<b>See Statement 6</b>	29,512.	1,284,834.		29,512.
	<b>24 Total operating and administrative expenses</b> Add lines 13 through 23 <b>Part XV</b>	1,732,757.	1,612,800.		212,407.
<b>25</b> Contributions, gifts, grants paid	3,460,867.			6,451,850.	
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	5,193,624.	1,612,800.		6,664,257.	
<b>27 Subtract line 26 from line 12:</b>					
<b>a</b> Excess of revenue over expenses and disbursements	3,012,721.				
<b>b</b> Net investment income (if negative, enter -0-)		14,024,167.			
<b>c</b> Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash— non-interest-bearing	5,823.	9,075.	9,075.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach sch) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	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 ▶			
Liabilities	Less: accumulated depreciation (attach schedule) ▶			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) Statement 7	169,107,807.	157,809,491.	157,809,491.
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶ See Statement 8)		132,725.	132,725.
	16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	169,113,630.	157,951,291.	157,951,291.
	17 Accounts payable and accrued expenses	911.	441.	
	18 Grants payable	27,150,012.	24,070,379.	
	19 Deferred revenue			
Net Assets or Fund Balances	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ See Statement 9)	635,828.	573,003.	
	23 Total liabilities (add lines 17 through 22)	27,786,751.	24,643,823.	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input checked="" type="checkbox"/>			
	24 Unrestricted	141,326,879.	133,307,468.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	141,326,879.	133,307,468.	
	31 Total liabilities and net assets/fund balances (see instructions)	169,113,630.	157,951,291.	

## 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 30 (must agree with end-of-year figure reported on prior year's return)	1	141,326,879.
2 Enter amount from Part I, line 27a	2	3,012,721.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	144,339,600.
5 Decreases not included in line 2 (itemize) ▶ See Statement 10	5	11,032,132.
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	133,307,468.

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

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

  

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

  

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

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

  

2 Capital gain net income or (net capital loss). <span style="float: right;">[ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 ]</span>	2	9,789,188.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). <span style="float: right;">[ If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8 ]</span>	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	6,750,467.	155,170,334.	0.043504
2016	6,952,018.	142,059,253.	0.048937
2015	7,436,002.	149,165,901.	0.049851
2014	6,542,714.	150,548,267.	0.043459
2013	6,814,120.	138,760,732.	0.049107

  

2 Total of line 1, column (d)	2	0.234858
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years	3	0.046972
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	164,017,057.
5 Multiply line 4 by line 3	5	7,704,209.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	140,242.
7 Add lines 5 and 6	7	7,844,451.
8 Enter qualifying distributions from Part XII, line 4	8	6,664,257.

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)**

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary – see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here. <input type="checkbox"/> and enter 1% of Part I, line 27b		1	280,483.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		2	0.
3 Add lines 1 and 2		3	280,483.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	280,483.
6 Credits/Payments			
a 2018 estimated tax pmts and 2017 overpayment credited to 2018	6a	243,926.	
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	243,926.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	36,557.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2019 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		X
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		
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions CA		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

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

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule. See instructions	11	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement. See instructions	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>WWW.COLBURNFOUNDATION.ORG</u>	13	X
14 The books are in care of <u>LAYNE B PINKERNELL</u> Telephone no <u>323-464-4640</u> Located at <u>6311 ROMAINE ST., STE 7138 LOS ANGELES CA</u> ZIP + 4 <u>90038</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year <u>N/A</u>	15	N/A
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country <u></u>	16	X

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

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

	Yes	No
1 a 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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>	1 b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>		
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 all years listed, answer 'No' and attach statement - see instructions)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__ , 20__ , 20__ , 20__</u>		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If 'Yes,' did it have excess business holdings in 2018 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 2018)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4 b	X

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

		Yes	No
<b>5a</b>	During the year, did the foundation pay or incur any amount to		
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<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 any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	<b>5b</b> N/A	
	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?	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No	
	If 'Yes,' attach the statement required by Regulations section 53.4945–5(d)		
<b>6a</b>	Did the foundation, during the year, receive any funds, directly or indirectly, to 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?	<b>6b</b> X	
	If 'Yes' to 6b, file Form 8870.		
<b>7a</b>	At any time during the tax year, was the foundation a party to a prohibited tax 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?	N/A <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(s) 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****1 List all officers, directors, trustees, and foundation managers and their compensation. See instructions.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 12		24,000.	0.	0.

**2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter 'NONE.'**

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

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

0

**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
ANGELES INVESTMENT ADVISORS 429 SANTA MONICA BLVD., STE 650 SANTA MONICA, CA 90401	INVESTMENT ADVISOR	266,464.
GRANT THORNTON LLP 515 S FLOWER ST, 7TH FLOOR LOS ANGELES, CA 90071	ACCOUNTING	50,000.
Total number of others receiving over \$50,000 for professional services		0

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

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

	Expenses
1 N/A	
2	
3	
4	

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

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1 a	166,494,282.
b	Average of monthly cash balances	1 b	20,497.
c	Fair market value of all other assets (see instructions)	1 c	
d	Total (add lines 1a, b, and c)	1 d	166,514,779.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	166,514,779.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	2,497,722.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	164,017,057.
6	Minimum investment return. Enter 5% of line 5	6	8,200,853.

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

1	Minimum investment return from Part X, line 6	1	8,200,853.
2a	Tax on investment income for 2018 from Part VI, line 5	2 a	280,483.
b	Income tax for 2018 (This does not include the tax from Part VI.)	2 b	
c	Add lines 2a and 2b	2 c	280,483.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	7,920,370.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	7,920,370.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	7,920,370.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1 a	6,664,257.
b	Program-related investments — total from Part IX-B	1 b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	6,664,257.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,664,257.

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



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

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
<b>1</b> Distributable amount for 2018 from Part XI, line 7				7,920,370.
<b>2</b> Undistributed income, if any, as of the end of 2018				
<b>a</b> Enter amount for 2017 only			4,909,136.	
<b>b</b> Total for prior years 20____, 20____, 20____		0.		
<b>3</b> Excess distributions carryover, if any, to 2018				
<b>a</b> From 2013				
<b>b</b> From 2014				
<b>c</b> From 2015				
<b>d</b> From 2016				
<b>e</b> From 2017				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 6,664,257.				
<b>a</b> Applied to 2017, but not more than line 2a			4,909,136.	
<b>b</b> Applied to undistributed income of prior years (Election required — see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required — see instructions)	0.			
<b>d</b> Applied to 2018 distributable amount				1,755,121.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a) )	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<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		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount — see instructions.		0.		
<b>e</b> Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount — see instructions.			0.	
<b>f</b> Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019.				6,165,249.
<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)	0.			
<b>8</b> Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	0.			
<b>9</b> Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2014				
<b>b</b> Excess from 2015				
<b>c</b> Excess from 2016				
<b>d</b> Excess from 2017				
<b>e</b> Excess from 2018				

BAA

Form 990-PF (2018)

N/A

- b 85% of line 2a**

**c** Qualifying distributions from Part XII,  
line 4 for each year listed

**d** Amounts included in line 2c not used directly for active conduct of exempt activities

**e** Qualifying distributions made directly for active conduct of exempt activities  
Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon.

a 'Assets' alternative test – enter:

**(1) Value of all assets**

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

**b** 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c 'Support' alternative test – enter

**(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3) ~~Largest amount of support from an exempt organization~~

**(4) Gross investment income**

### 1 Information Regarding Foundation Managers:

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

None

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

None

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

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

See Statement 13

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

See Statement for Line 2a

**c Any submission deadlines**

See Statement for Line 2a

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

See Statement for Line 2a

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a</i> Paid during the year See Statement 14				
<b>Total</b>			<b>3 a</b>	6,541,850.
<i>b</i> Approved for future payment See Statement 15				
<b>Total</b>			<b>3 b</b>	25,653,500.

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1	Program service revenue					
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					
4	Dividends and interest from securities			14	2,421,612.	
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			18	5,783,104.	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a	MISCELLANEOUS			1	1,629.	
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				8,206,345.	
13	Total. Add line 12, columns (b), (d), and (e)				8,206,345.	

(See worksheet in line 13 instructions to verify calculations )

<b>Part XVI-B</b>	<b>Relationship of Activities to the Accomplishment of Exempt Purposes</b>
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[illegible]



## COLBURN FOUNDATION

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Statement 1  
Form 990-PF, Part I, Line 11  
Other Income

	(a) Revenue per Books	(b) Net Investment Income	(c) Adjusted Net Income
MISCELLANEOUS	\$ 1,629.		
Total	<u>\$ 1,629.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 2  
Form 990-PF, Part I, Line 16a  
Legal Fees

	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
MARILYN O'TOOLE	\$ 11,000.			\$ 11,000.
Total	<u>\$ 11,000.</u>	<u>\$ 0.</u>		<u>\$ 11,000.</u>

Statement 3  
Form 990-PF, Part I, Line 16b  
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
GRANT THORNTON LLP	\$ 50,000.			\$ 50,000.
Total	<u>\$ 50,000.</u>	<u>\$ 0.</u>		<u>\$ 50,000.</u>

Statement 4  
Form 990-PF, Part I, Line 16c  
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
INVESTMENT MANAGEMENT FEES	\$ 1,465,900.	\$ 266,464.		
OTHER	51,790.			\$ 51,790.
Total	<u>\$ 1,517,690.</u>	<u>\$ 266,464.</u>	<u>-</u>	<u>\$ 51,790.</u>

## COLBURN FOUNDATION

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**Statement 5**  
**Form 990-PF, Part I, Line 18**  
**Taxes**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
DEFERRED EXCISE TAXES	\$ -56,751.			
FEDERAL EXCISE TAXES	111,201.			
FOREIGN TAXES		\$ 61,502.		
PAYROLL TAXES	3,210.			\$ 3,210.
Total	<u>\$ 57,660.</u>	<u>\$ 61,502.</u>		<u>\$ 3,210.</u>

**Statement 6**  
**Form 990-PF, Part I, Line 23**  
**Other Expenses**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
BUSINESS MEALS	\$ 69.			\$ 69.
EQUIPMENT MAINTENANCE	5,236.			5,236.
INSURANCE	16,121.			16,121.
MEETING EXPENSE	182.			182.
MEMBERSHIPS	2,500.			2,500.
OTHER EXPENSE	332.			332.
PARTNERSHIP EXPENSES		\$ 1,284,834.		
PAYROLL SERVICE FEES	2,151.			2,151.
POSTAGE AND SHIPPING	709.			709.
SUPPLIES	842.			842.
TELEPHONE	1,370.			1,370.
Total	<u>\$ 29,512.</u>	<u>\$ 1,284,834.</u>		<u>\$ 29,512.</u>

**Statement 7**  
**Form 990-PF, Part II, Line 13**  
**Investments - Other**

	Valuation Method	Book Value	Fair Market Value
<u>Other Investments</u>			
ANGELES ABSOLUTE RETURN FUND	Mkt Val	\$ 23,470,290.	\$ 23,470,290.
ANGELES GLOBAL EQUITY OPPORTUNITY FUND L	Mkt Val	40,652,404.	40,652,404.
ANGELES PRIVATE MARKET FUND	Mkt Val	4,002,730.	4,002,730.
BAIN CAPITAL ASIA FUND III	Mkt Val	628,116.	628,116.
BAIN CAPITAL FUND XI	Mkt Val	2,872,962.	2,872,962.
BROOKFIELD CAPITAL PARTNERS IV	Mkt Val	3,376,419.	3,376,419.
CHARLESBANKEQUITY FUND VIII	Mkt Val	1,342,876.	1,342,876.
CLEARLAKE CAPITAL PARTNERS IV	Mkt Val	3,123,648.	3,123,648.
CONTRARIAN DISTRESSED REAL ESTATE	Mkt Val	464,316.	464,316.
DOVER STREET VIII	Mkt Val	2,063,381.	2,063,381.
DUNE REAL ESTATE FUND III	Mkt Val	3,150,062.	3,150,062.
GSO ENERGY SLEECT OPPORTUNITY FUND	Mkt Val	1,501,598.	1,501,598.
KAYNE ANDERSON ENERGY FUND IV	Mkt Val	120,360.	120,360.
KAYNE ANDERSON ENERGY FUND VI	Mkt Val	598,478.	598,478.

## COLBURN FOUNDATION

95-4693145

**Statement 7 (continued)**  
**Form 990-PF, Part II, Line 13**  
**Investments - Other**

	Valuation Method	Book Value	Fair Market Value
<u>Other Investments</u>			
LONE STAR REAL ESTATE FUND II	Mkt Val	\$ 96,347.	\$ 96,347.
LONE STAR REAL ESTATE FUND III	Mkt Val	397,934.	397,934.
LONE STAR REAL ESTATE FUND IV	Mkt Val	1,383,524.	1,383,524.
LONE STAR FUND VIII	Mkt Val	1,234,696.	1,234,696.
LONE STAR FUND IX	Mkt Val	1,475,754.	1,475,754.
OCH-ZIFF REAL ESTATE FUND II	Mkt Val	475,328.	475,328.
OCH-ZIFF REAL ESTATE FUND III	Mkt Val	1,180,114.	1,180,114.
ORBIMED ROYALTY OPPORTUNITIES II	Mkt Val	655,267.	655,267.
PATHWAY PRIVATE EQUITY FUND 2007	Mkt Val	2,600,883.	2,600,883.
VISTA EQUITY PARTNERS V	Mkt Val	998,158.	998,158.
ADAGE CAPITAL PARTNERS	Mkt Val	8,612,121.	8,612,121.
HARVEST MLP INCOME FUND	Mkt Val	0.	0.
ANGELES PRIVATE MARKET FUND 2	Mkt Val	685,073.	685,073.
Total Other Investments		<u>\$ 107,162,839.</u>	<u>\$ 107,162,839.</u>
<u>Other Securities</u>			
PUBLICLY TRADED SECURITIES	Mkt Val	50,646,652.	50,646,652.
Total Other Securities		<u>\$ 50,646,652.</u>	<u>\$ 50,646,652.</u>
Total		<u>\$ 157,809,491.</u>	<u>\$ 157,809,491.</u>

**Statement 8**  
**Form 990-PF, Part II, Line 15**  
**Other Assets**

	Book Value	Fair Market Value
FEDERAL EXCISE TAX RECEIVABLE	\$ 132,725.	\$ 132,725.
Total	<u>\$ 132,725.</u>	<u>\$ 132,725.</u>

**Statement 9**  
**Form 990-PF, Part II, Line 22**  
**Other Liabilities**

DEFERRED TAX LIABILITY	\$ 573,003.
Total	<u>\$ 573,003.</u>



## COLBURN FOUNDATION

95-4693145

**Statement 10**  
**Form 990-PF, Part III, Line 5**  
**Other Decreases**

Net Unrealized Gains or Losses on Investments

Total \$ 11,032,132.  
\$ 11,032,132.

**Statement 11**  
**Form 990-PF, Part VI, Penalty and Interest**  
**Balance Due**

Tax Due \$ 36,557.  
 Late Payment Penalty 1,097.  
 Total \$ 37,654.

**Statement 12**  
**Form 990-PF, Part VIII, Line 1**  
**List of Officers, Directors, Trustees, and Key Employees**

<u>Name and Address</u>	<u>Title and Average Hours Per Week Devoted</u>	<u>Compen- sation</u>	<u>Contri- bution to EBP &amp; DC</u>	<u>Expense Account/ Other</u>
CAROL C GRIGOR 6311 ROMAINE ST., STE 7138 LOS ANGELES, CA 90038	Chairman 1.00	\$ 0.	\$ 0.	\$ 0.
RICHARD COLBURN 6311 ROMAINE ST., SUITE 7138 LOS ANGELES, CA 90038	Director 1.00	0.	0.	0.
DAVID D COLBURN 6311 ROMAINE ST., SUITE 7138 LOS ANGELES, CA 90038	Director 1.00	0.	0.	0.
ROBERT ATTIYEH 6311 ROMAINE ST., SUITE 7138 LOS ANGELES, CA 90038	Director 1.00	24,000.	0.	0.
GAIL EICHENTHAL 6311 ROMAINE ST., SUITE 7138 LOS ANGELES, CA 90038	Director 1.00	0.	0.	0.
JOHN KNUCHOLS 6311 ROMAINE ST., SUITE 7138 LOS ANGELES, CA 90038	Director 1.00	0.	0.	0.
ALLISON SAMPSON 6311 ROMAINE ST., SUITE 7138 LOS ANGELES, CA 90038	Director 1.00	0.	0.	0.

## COLBURN FOUNDATION

95-4693145

**Statement 12 (continued)**  
**Form 990-PF, Part VIII, Line 1**  
**List of Officers, Directors, Trustees, and Key Employees**

<u>Name and Address</u>	<u>Title and Average Hours Per Week Devoted</u>	<u>Compen- sation</u>	<u>Contri- bution to EBP &amp; DC</u>	<u>Expense Account/ Other</u>
LAYNE PINKERNELL 6311 ROMAINE ST., SUITE 7138 LOS ANGELES, CA 90038	Treasurer 24.00	\$ 0.	\$ 0.	\$ 0.
Total		\$ 24,000.	\$ 0.	\$ 0.

**Statement 13**  
**Form 990-PF, Part XV, Line 2a-d**  
**Application Submission Information**

Name of Grant Program: FELIX RACELIS

Name: Care Of:

Street Address: 6311 ROMAINE ST., SUITE 7138

City, State, Zip Code: LOS ANGELES, CA 90038

Telephone: 323-464-4640

E-Mail Address: FRACELIS@COLBURNFOUNDATION.ORG

Form and Content: PLEASE NOTE THAT WE STRONGLY URGE ALL GRANT SEEKERS TO CONTACT US AT 323-464-4640 BEFORE SUBMITTING A LETTER OF INTENT OR AN APPLICATION. AFTER A CONVERSATION, WE MAY ENCOURAGE YOU TO SUBMIT A LETTER OF INTENT. IF WE ARE UNFAMILIAR WITH YOUR ORGANIZATION OR PROGRAM, WE WILL LIKELY WANT TO MEET WITH YOU AND/OR OBSERVE YOUR PROGRAM BEFORE ENCOURAGING YOU TO TAKE FURTHER STEPS. MOST OF OUR GRANTS ARE IN THE FORM OF GENERAL OPERATING SUPPORT. WE HAVE AN ONLINE APPLICATION PROCESS AND WILL WALK YOU THROUGH WHEN YOU ARE READY TO SUBMIT AN APPLICATION. THE APPLICATION REQUIRES THE FOLLOWING MISSION AND HISTORY OF YOUR ORGANIZATION, A COPY OF PROOF OF 501C3 STATUS, MOST RECENT TWO AUDITED FINANCIAL STATEMENTS OR FORM 990'S IN THE CASE THAT YOU ARE NOT AUDITED. IF THIS IS MORE THAN A YEAR OLD, PLEASE ALSO SUBMIT AN INTERNAL FINANCIAL STATEMENT FOR THE MOST RECENTLY COMPLETED FISCAL YEAR, CURRENT YEAR BUDGET IF YOU ARE APPLYING FOR FUNDING FOR A FUTURE YEAR'S ACTIVITY.

Submission Deadlines: NONE

Restrictions on Awards: GRANTS ARE GENERALLY AWARDED TO ORGANIZATIONS IN THE SOUTHERN CALIFORNIA AREA. THE PURPOSE OF THE GRANT MUST BE FOR FURTHERING THE STUDY, TEACHING, AND PERFORMANCE OF CLASSICAL MUSIC AND DANCE.

## COLBURN FOUNDATION

95-4693145

**Statement 14**  
**Form 990-PF, Part XV, Line 3a**  
**Recipients Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
THE COLBURN SCHOOL 200 S GRAND AVE LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	\$ 3,180,000
LOS ANGELES PHILHARMONIC 135 N GRAND AVE LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	750,000
LOS ANGELES OPERA COMPANY 135 N GRAND AVE LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	750,500
LOS ANGELES CHAMBER ORCHESTRA 350 S FIGUEROA ST, STE 183 LOS ANGELES, CA 90071	NONE	PC	CLASSICAL ARTS	363,000
LOS ANGELES MASTER CHORALE 135 N GRAND AVE+B124 LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	209,000
MUSICA ANGELICA 65 PINE AVE 12 LONG BEACH, CA 90802	NONE	PC	CLASSICAL ARTS	82,500
USC THORNTON SCHOOL OF MUSIC P.O. BO 77913 LOS ANGELES, CA 90007	NONE	PC	CLASSICAL ARTS	156,000
CALIFORNIA INSTITUTE OF THE ARTS 24700 MCBEAN PARKWAY VALENCIA, CA 91355	NONE	PC	CLASSICAL ARTS	100,000
AMERICAN YOUTH SYMPHONY 2365 WESTWOOD BLVD., #23 LOS ANGELES, CA 90064	NONE	PC	CLASSICAL ARTS	20,000
DACAMERA SOCIETY 10 CHESTER PLACE LOS ANGELES, CA 90007	NONE	PC	CLASSICAL ARTS	20,000

## COLBURN FOUNDATION

95-4693145

**Statement 14**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
ELEMENTAL MUSIC 1831 STANGORD STREET SUITE 111 SANTA MONICA, CA 90404	NONE	PC	CLASSICAL ARTS	\$ 30,000
HEARTS OF LOS ANGELES 2701 WILSHIRE BLVD. SUITE 100 LOS ANGELES, CA 90057	NONE	PC	CLASSICAL ARTS	30,000
IDYLVILD ARTS FESTIVAL P.O. BOX 38 IDYLVILD, CA 92549	NONE	PC	CLASSICAL ARTS	55,000
KUSC P.O. BOX 77913 LOS ANGELES, CA 90007	NONE	PC	CLASSICAL ARTS	50,000
LONG BEACH OPERA 507 PACIFIC AVENUE LONG BEACH, CA 90802	NONE	PC	CLASSICAL ARTS	15,000
LOS ANGELES MUSIC AND ARTS SCHOOL 1610 EAST THIRD STREET LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	25,000
MADISON PROJECT C/O THE BROAD STAGE 1900 PICO BLVD. SANTA MONICA, CA 90405	NONE	PC	CLASSICAL ARTS	30,000
MONDAY EVENING CONCERTS 3710 S ROBERTSON BLVD SUITE 200 CULVER CITY, CA 90232	NONE	PC	CLASSICAL ARTS	15,000
MUSEUM ASSOCIATES C/O LOS ANGELES COUNTY MUSEUM 3905 WILSHIRE BLVD. LOS ANGELES, CA 90036	NONE	PC	CLASSICAL ARTS	15,000

## COLBURN FOUNDATION

95-4693145

**Statement 14**  
**Form 990-PF, Part XV, Line 3a**  
**Recipients Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
MUSIC ACADEMY OF THE WEST 1070 FAIRWAY ROAD SANTA BARBARA, 93108	NONE	PC	CLASSICAL ARTS	30,000
NEIGHBORHOOD MUSIC SCHOOL ASSOCIATION 338 S. BOYLE AVE. LOW ANGELES, CA 90033	NONE	PC	CLASSICAL ARTS	30,000
THE NEW SCHOOL 55 WEST 13TH STREET ROOM 929 NEW YORK, NY 10011	NONE	PC	CLASSICAL ARTS	12,000
OJAI FESTIVALS, LTD P.O. BOX 185 OJAI, CA 93024	NONE	PC	CLASSICAL ARTS	17,000
PACIFIC SYMPHONY 3631 SOUTH HARBOR BLVD SUITE 100 SANTA ANA, CA 92704	NONE	PC	CLASSICAL ARTS	40,000
PASADENA CONSERVATORY OF MUSIC 100 NORTH HILLS AVENUE PASADENA , CA 91106	NONE	PC	CLASSICAL ARTS	20,000
PHILHARMONIC SOCIETY OF ORANGE COUNTY 2082 BUSINESS CENTER DRIVE SUITE 100 IRVINE, CA 92612	NONE	PC	CLASSICAL ARTS	30,000
UCLA FOUNDATION 2539 WSCHOENBURG MUSIC BLDG BOX 57234 LOS ANGELES, CA 90095	NONE	PC	CLASSICAL ARTS	50,000

## COLBURN FOUNDATION

95-4693145

**Statement 14**  
**Form 990-PF, Part XV, Line 3a**  
**Recipients Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
RENEISSANCE ARTS ACADEMY 1800 COLORADO BLVD EAGLE ROCK, CA 90041				\$ 30,000
SEGERSTROM CENTER FOR THE ARTS 600 TOWN CENTER DRIVE COSTA MESA, CA 92626	NONE	PC	CLASSICAL ARTS	25,000
YOUNG CONCERT ARTISTS 250 WEST 57TH STREET NEW YORK, NY 10019	NONE	PC	CLASSICAL ARTS	20,000
WALLIS ANNENBERG CENTER FOR THE PERFORMING ARTS 9390 N SANTA MONICA BLVD BEVERLY HILLS CA 90210	NONE	PC	CLASSICAL ARTS	20,000
ARTS HIGH FOUNDATION 1149 S. HILL STREET SUITE H-100 LOS ANGELES, CA 90015	NONE	PC	CLASSICAL ARTS	10,000
BAROQUE MUSIC FESTIVAL, CORONA DEL MAR P.O. BOX 838 CORONA DEL MAR, CA 92625	NONE	PC	CLASSICAL ARTS	7,500
BOSTON COURT PERFORMING ARTS CENTER P.O. BOX 60187 PASADENA, CA 91116	NONE	PC	CLASSICAL ARTS	7,500
CALDER PERFORMING ARTS ORGANIZATION DBA CALDER QUARTET 3270 DEESCANSO DRIVE LOS ANGELES, CA 90026	NONE	PC	CLASSICAL ARTS	5,000

## COLBURN FOUNDATION

95-4693145

**Statement 14**  
**Form 990-PF, Part XV, Line 3a**  
**Recipients Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
CAL STATE NORTHRIDGE 18111 NORDHOFF STREET NORTHRIDGE, CA 91330	NONE	PC	CLASSICAL ARTS	\$ 10,000
CAMERATA PACIFICA P.O. BOX 30116 SANTA BARBARA, CA 93130	NONE	PC	CLASSICAL ARTS	5,000
CHAMBER MUSIC SOCIETY OF LINCOLN CENTER 70 LINCOLN CENTER PLAZA NEW YOUR, NY 10023	NONE	PC	CLASSICAL ARTS	10,000
CHORUS AMERICA 1156 15TH STREET, NW SUITE 310 WASHINGTON DC 20005	NONE	PC	CLASSICAL ARTS	5,000
CENTER STAGE STRINGS P.O. BOX 1203 THREE RIVERS, CA 93271	NONE	PC	CLASSICAL ARTS	5,000
EIGHTH STREET BLACKBIRD 4045 N ROCKWELL 2ND FLOOR CHICAGO, IL 90618	NONE	PC	CLASSICAL ARTS	5,000
ETM-LA, INC 2501 W BURBANK BLVD SUITE 301 BURBANK, CA 91505	NONE	PC	CLASSICAL ARTS	10,000
GRAND PERFORMANCE 350 S GRAND AVE, SUITE A4 LOS ANGELES, CA 90071	NONE	PC	CLASSICAL ARTS	10,000
HEAR NOW MUSIC FESTIVAL 4209 VIA ARBOLADA, #231 LOS ANGELES, CA 90042	NONE	PC	CLASSICAL ARTS	5,000

## COLBURN FOUNDATION

95-4693145

**Statement 14**  
**Form 990-PF, Part XV, Line 3a**  
**Recipients Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
JACARANDA 1626 N BENTON WAY LOS ANGELES, CA 90026	NONE	PC	CLASSICAL ARTS	\$ 10,000
KONTRAPUNKTUS NEO-BAROQUE CHAMBER ORCHESTRA P.O. BOX 2959 SEAL BEACH, CA 90740	NONE	PC	CLASSICAL ARTS	2,500
LA'S BEST 200 NORTH SPRING STREET SUITE M-120 LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	8,000
LA CHILDRENS CHORUS 585 E. COLORADO BLVD PASADENA, AC 91101	NONE	PC	CLASSICAL ARTS	10,000
LOS ANGELES COUNTY DEPT OF ARTS AND CULTURE 1055 WILSHIRE BLVD SUTIE 800 LOS ANGELES, CA 90017	NONE	PC	CLASSICAL ARTS	10,000
MARLBORO SCHOOL OF MUSIC 1528 WALNUT STREET SUITE 301 PHILADELPHIA, PA 19102	NONE	PC	CLASSICAL ARTS	10,000
MUSIC GUILD 3637 MOTOR AVENUE SUITE 240 LOS ANGELES, CA 90034	NONE	PC	CLASSICAL ARTS	10,000
NEW WEST SYMPHONY ASSOCIATION 2100 THOUSAND OAKS BLVD. SUITE D THOUSAND OAKS, CA 91362	NONE	PC	CLASSICAL ARTS	10,000



## COLBURN FOUNDATION

95-4693145

**Statement 14**  
**Form 990-PF, Part XV, Line 3a**  
**Recipients Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
OLYMPIA PHILHARMONIC SOCIETY 465 W. LE ROY AVENUE ARCADIA, CA 91007	NONE	PC	CLASSICAL ARTS	\$ 5,000
PACIFIC CHORALE 3303 HARBOR BLVD. SUITE E5 COSTA MESA, CA 92626	NONE	PC	CLASSICAL ARTS	10,000
FULCRUM ARTS - FORMERLY PASADENA ARTS COUNCIL 495 E COLORADO BLVD PASADENA, CA 91101	NONE	PC	CLASSICAL ARTS	7,000
PASADENA SYMPHONY 3631 SOUTH HARBOR BLVD SUITE 100 SANTA ANA, CA 92704	NONE	PC	CLASSICAL ARTS	10,000
PERFORMING ARTS CENTER OF LOS ANGELES 135 N. GRAND AVENUE LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	5,000
PIANO SPHERES 4209 VIA ARBOLETA, #231 LOS ANGELES, CA 90042	NONE	PC	CLASSICAL ARTS	19,000
REDLANDS SYMPHONY ASSOCIATION 210 E CITRUS AVENUE REDLANDS, CA 92373	NONE	PC	CLASSICAL ARTS	5,000
RIVERSIDE COMMUNITY COLLEGE DISTRICT FOUNDATION 3564 RAMONA DRIVE RIVERSIDE, CA 92506	NONE	PC	CLASSICAL ARTS	10,000
SANTA CECILIA OPERA AND ORCHESTRA ASSOCIATION 2759 WEST BROADWAY LOS ANGELES, CA 90041	NONE	PC	CLASSICAL ARTS	15,000

## COLBURN FOUNDATION

95-4693145

**Statement 14**  
**Form 990-PF, Part XV, Line 3a**  
**Recipients Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
SANTA MONICA YOUTH ORCHESTRA P.O. BOX 128 SANTA MONICA, CA 90406	NONE	PC	CLASSICAL ARTS	\$ 10,000
SKIRBALL CULTURAL CENTER 2701 N SEPULVEDA BLVD LOS ANGELES, CA 90049	NONE	PC	CLASSICAL ARTS	5,000
SONGFEST 6369 EUCLID ROAD CINCINNATI, OH 45236	NONE	PC	CLASSICAL ARTS	10,000
SOUTH BAY CHAMBER MUSIC SOCIETY, INC. P.O. BOX 2313 PALOS VERDES PENINSULA, CA	NONE	PC	CLASSICAL ARTS	5,000
STREET SYMPHONY PROJECT 1463 1/2 RIDGE WAY LOS ANGELES, CA 90026	NONE	PC	CLASSICAL ARTS	5,000
VOX FEMINIA LOS ANGELES 3341 CAROLINE AVE CULVER CITY, CA 90232	NONE	PC	CLASSICAL ARTS	5,000
WILD UP P.O. BOX 292075 LOS ANGELES, CA 90029	NONE	PC	CLASSICAL ARTS	6,000
YOUNG MUSICIANS FOUNDATION 1844 CYPRESS AVE., #101 LOS ANGELES, CA 90065	NONE	PC	CLASSICAL ARTS	10,000
THE OPERA BUFFS, INC 3355 FLOYD TERRACE LOS ANGELES, CA 90068	NONE	PC	CLASSICAL ARTS	5,000
OPERA LEAGUE OF LOS ANGELES 135 N. GRAAD AVENUE SUITE 327 LOS ANGELES, CA 90012				2,500

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## Federal Statements

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COLBURN FOUNDATION

95-4693145

**Statement 14**  
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**Recipients Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
WEST LOS ANGELES SYMPHONY C/O BREGMAN, DACEY & GOLDSMITH 10880 WILSHIRE BLVD., STE 900 LOS ANGELES, CA 90024				\$ 5,000
ARROWHEAD ARTS ASSOCIATION P.O. BOX 1925 LAKE ARROWHEAD, CA 92352	NONE	PC	CLASSICAL ARTS	500
PASS THRU K-1'S				1,350
TOTAL RECIPIENTS PAID DURING THE YEAR				<u>6,541,850</u>

## COLBURN FOUNDATION

95-4693145

**Statement 15**  
**Form 990-PF, Part XV, Line 3b**  
**Grants Approved for Future Payment**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
THE COLBURN SCHOOL 200 S GRAND AVE LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	17,010,000
LOS ANGELES PHILHARMONIC 135 N GRAND AVE LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	6,000,000
LOS ANGELES OPERA COMPANY 135 N GRAND AVE LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	750,000
LOS ANGELES CHAMBER ORCHESTRA 350 S FIGUROA ST, STE 183 LOS ANGELES, CA 90071	NONE	PC	CLASSICAL ARTS	600,000
LOS ANGELES MASTER CHORALE 135 N GRNAD AVE LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	450,000
MUSICA ANGELICA 65 PINE AVE 12 LONG BEACH, CA 90802	NONE	PC	CLASSICAL ARTS	175,000
USC THORNTON SCHOOL OF MUSIC P.O. BO 77913 LOS ANGELES, CA 90007	NONE	PC	CLASSICAL ARTS	100,000
CALIFORNIA INSTITUTE OF THE ARTS 24700 MCBEAN PARKWAY VALENCIA, CA 91355	NONE	PC	CLASSICAL ARTS	100,000
HEARTS OF LOS ANGELES 2701 WILSHIRE BLVD. SUITE 100 LOS ANGELES, CA 90057	NONE	PC	CLASSICAL ARTS	50,000

## COLBURN FOUNDATION

95-4693145

**Statement 15**  
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Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
IDYLVILD ARTS FESTIVAL P.O. BOX 38 IDYLVILD, CA 92549	NONE	PC	CLASSICAL ARTS	\$ 50,000
LOS ANGELES CHILDRENS CHORUS 585 E. COLORADO BLVD. PASADENA, CA 91101	NONE	PC	CLASSICAL ARTS	15,000
MADISON PROJECT C/O BROAD STAGE 1900 PICO BLVD. SANTA MONICA, CA 90405	NONE	PC	CLASSICAL ARTS	25,000
MUSIC ACADEMY OF THE WEST 1070 FAIRWAY ROAD SANTA BARBARA, 93108	NONE	PC	CLASSICAL ARTS	30,000
NEIGHBORHOOD MUSIC SCHOOL ASSOCIATION 338 S. BOYLE AVE. LOW ANGELES, CA 90033	NONE	PC	CLASSICAL ARTS	20,000
THE NEW SCHOOL 55 WEST 13TH STREET ROOM 929 NEW YORK, NY 10011	NONE	PC	CLASSICAL ARTS	15,000
OJAI FESTIVALS, LTD P.O. BOX 185 OJAI, CA 93024	NONE	PC	CLASSICAL ARTS	10,000
PHILHARMONIC SOCIETY OF ORANGE COUNTY 2082 BUSINESS CENTER DRIVE SUITE 100 IRVINE, CA 92612	NONE	PC	CLASSICAL ARTS	30,000
UCLA FOUNDATION 2539 WSCHOENBURG MUSIC BLDG BOX 57234 LOS ANGELES, CA 90095	NONE	PC	CLASSICAL ARTS	50,000

## COLBURN FOUNDATION

95-4693145

**Statement 15**  
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**Grants Approved for Future Payment**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
SEGERSTROM CENTER FOR THE ARTS 600 TOWN CENTER DRIVE COSTA MESA, CA 92626	NONE	PC	CLASSICAL ARTS	\$ 25,000
YOUNG CONCERT ARTISTS 250 WEST 57TH STREET NEW YORK, NY 10019	NONE	PC	CLASSICAL ARTS	20,000
ARTS HIGH FOUNDATION 1149 S. HILL STREET SUITE H-100 LOS ANGELES, CA 90015	NONE	PC	CLASSICAL ARTS	20,000
CAL STATE NORTHRIDGE 18111 NORDHOFF STREET NORTHRIDGE, CA 91330	NONE	PC	CLASSICAL ARTS	30,000
CENTER STAGE STRINGS P.O. BOX 1203 THREE RIVERS, CA 93271	NONE	PC	CLASSICAL ARTS	5,000
EIGHTH STREET BLACKBIRD 4045 N ROCKWELL 2ND FLOOR CHICAGO, IL 90618	NONE	PC	CLASSICAL ARTS	10,000
LA'S BEST 200 NORTH SPRING STREET SUITE M-120 LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	16,000
NEW WEST SYMPHONY ASSOCIATION 2100 THOUSAND OAKS BLVD. SUITE D THOUSAND OAKS, CA 91362	NONE	PC	CLASSICAL ARTS	10,000
OLYMPIA PHILHARMONIC SOCIETY 465 W. LE ROY AVENUE ARCADIA, CA 91007	NONE	PC	CLASSICAL ARTS	5,000

## COLBURN FOUNDATION

95-4693145

**Statement 15**  
**Form 990-PF, Part XV, Line 3b**  
**Grants Approved for Future Payment**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
PACIFIC CHORALE 3303 HARBOR BLVD. SUITE E5 COSTA MESA, CA 92626	NONE	PC	CLASSICAL ARTS	10,000
PERFORMING ARTS CENTER OF LOS ANGELES 135 N. GRAND AVENUE LOS ANGELES, CA 90012	NONE	PC	CLASSICAL ARTS	5,000
PIANO SPHERES 4209 VIA ARBOLETA #231 LOS ANGELES, CA 90042	NONE	PC	CLASSICAL ARTS	2,500
SOUTH BAY CHAMBER MUSIC SOCIETY, INC. P.O. BOX 2313 PALOS VERDES PENINSULA, CA	NONE	PC	CLASSICAL ARTS	5,000
YOUNG MUSICIANS FOUNDATION 1844 CYPRESS AVENUE, #101 LOS ANGELES, CA 90065	NONE	PC	CLASSICAL ARTS	10,000
TOTAL GRANTS APPROVED FOR FUTURE PAYMENT				<u>25,653,500</u>