

**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.

For calendar year 2021 or tax year beginning

, and ending

Name of foundation <b>MAY AND STANLEY SMITH CHARITABLE TRUST</b>		<b>A Employer identification number</b> <b>** - ** 2075</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>770 TAMALPAIS DRIVE</b>	Room/suite <b>309</b>	<b>B Telephone number</b> <b>415-332-0166</b>
City or town, state or province, country, and ZIP or foreign postal code <b>CORTE MADERA, CA 94925</b>		<b>C</b> If exemption application is pending, check here ... <input type="checkbox"/>
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here ... <input checked="" type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here ... <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <b>511,123,367.</b>	<b>J</b> Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d), must be on cash basis.)	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ... <input type="checkbox"/>

<b>Part I Analysis of Revenue and Expenses</b> <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)</small>		(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 .....			<b>N/A</b>	
	<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 .....				
	<b>4</b> Dividends and interest from securities .....	10,625,409.	9,137,092.		<b>STATEMENT 1</b>
	<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 .....	52,450,691.			
	<b>b</b> Gross sales price for all assets on line 6a .....	52,450,691.			
	<b>7</b> Capital gain net income (from Part IV, line 2) .....		0.		
	<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) .....					
<b>11</b> Other income .....	-314,388.	-993,998.		<b>STATEMENT 2</b>	
<b>12 Total.</b> Add lines 1 through 11 .....	62,761,712.	8,143,094.			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc. ....	710,615.			522,672.
	<b>14</b> Other employee salaries and wages .....	857,927.			947,801.
	<b>15</b> Pension plans, employee benefits .....	399,174.			160,717.
	<b>16a</b> Legal fees ..... <b>STMT 3</b>	19,818.			2,919.
	<b>b</b> Accounting fees ..... <b>STMT 4</b>	118,636.			56,641.
	<b>c</b> Other professional fees ..... <b>STMT 5</b>	2,635,295.			97,471.
	<b>17</b> Interest .....				
	<b>18</b> Taxes ..... <b>STMT 6</b>	1,153,643.			352.
	<b>19</b> Depreciation and depletion .....				
	<b>20</b> Occupancy .....	208,006.			207,729.
	<b>21</b> Travel, conferences, and meetings .....	10,248.			10,234.
	<b>22</b> Printing and publications .....				
	<b>23</b> Other expenses ..... <b>STMT 7</b>	8,298,704.			93,410.
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 .....	14,412,066.			2,099,946.
	<b>25</b> Contributions, gifts, grants paid .....	24,189,378.			23,813,878.
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25 .....	38,601,444.	N/A		25,913,824.	
<b>27</b> Subtract line 26 from line 12:					
<b>a</b> Excess of revenue over expenses and disbursements ...	24,160,268.				
<b>b Net investment income</b> (if negative, enter -0-)		8,143,094.			
<b>c Adjusted net income</b> (if negative, enter -0-)			N/A		

Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only.	Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	35,267,833.	21,529,190.	21,529,190.
	3 Accounts receivable <b>11,127,898.</b>			
	Less: allowance for doubtful accounts	485,654.	11,127,898.	11,127,898.
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use	6,322.	6,001.	6,001.
	9 Prepaid expenses and deferred charges	97,859.	47,067.	47,067.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock <b>STMT 9</b>	270,638,020.	322,083,035.	322,083,035.
	c Investments - corporate bonds <b>STMT 10</b>	93,509,001.	82,026,503.	82,026,503.
	11 Investments - land, buildings, and equipment: basis			
Less: accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other <b>STMT 11</b>	90,123,085.	74,303,673.	74,303,673.	
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation				
15 Other assets (describe)				
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I)	490,127,774.	511,123,367.	511,123,367.	
Liabilities	17 Accounts payable and accrued expenses	907,720.	1,188,668.	
	18 Grants payable	10,200,000.	10,575,500.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe)			
23 <b>Total liabilities</b> (add lines 17 through 22)	11,107,720.	11,764,168.		
Net Assets or Fund Balances	<b>Foundations that follow FASB ASC 958, check here</b> <input type="checkbox"/>			
	<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</b> <input checked="" type="checkbox"/>			
	<b>and complete lines 26 through 30.</b>			
	26 Capital stock, trust principal, or current funds	201,336,001.	201,336,001.	
27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
28 Retained earnings, accumulated income, endowment, or other funds	277,684,053.	298,023,198.		
29 <b>Total net assets or fund balances</b>	479,020,054.	499,359,199.		
30 <b>Total liabilities and net assets/fund balances</b>	490,127,774.	511,123,367.		

**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	479,020,054.
2 Enter amount from Part I, line 27a	2	24,160,268.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	503,180,322.
5 Decreases not included in line 2 (itemize) <b>SEE STATEMENT 8</b>	5	3,821,123.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	499,359,199.



**Part VI-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? .....		<b>X</b>
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition ..... If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		<b>X</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? .....		<b>X</b>
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ <u>0.</u> (2) On foundation managers. ▶ \$ <u>0.</u>		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ <u>0.</u>		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? .....		<b>X</b>
If "Yes," attach a detailed description of the activities.		
<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? If "Yes," attach a conformed copy of the changes .....		<b>X</b>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? .....	<b>X</b>	
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? .....	<b>X</b>	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? .....		<b>X</b>
If "Yes," attach the statement required by <i>General Instruction T</i> .		
<b>6</b> 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? .....	<b>X</b>	
<b>7</b> 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 XIV .....	<b>X</b>	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ <u>CA</u>		
<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 <i>General Instruction G</i> ? If "No," attach explanation .....	<b>X</b>	
<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 2021 or the tax year beginning in 2021? See the instructions for Part XIII. If "Yes," complete Part XIII .....		<b>X</b>
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses .....		<b>X</b>
<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>X</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>X</b>
<b>13</b> Did the foundation comply with the public inspection requirements for its annual returns and exemption application? .....	<b>X</b>	
Website address ▶ <u>WWW.SMITHCT.ORG</u>		
<b>14</b> The books are in care of ▶ <u>MAY &amp; STANLEY SMITH CHARITABLE TR</u> Telephone no. ▶ <u>415-332-0166</u> Located at ▶ <u>770 TAMALPAIS DRIVE SUITE 309, CORTE MADERA, CA</u> ZIP+4 ▶ <u>94925</u>		
<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>N/A</b>
<b>16</b> At any time during calendar year 2021, 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>X</b>
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		

**Part VI-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
<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? .....	1a(1)	X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? .....	1a(2)	X
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? .....	1a(3)	X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? .....	1a(4)	X
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? .....		
(6) Agree to pay money or property to a government official? ( <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.) .....	1a(5)	X
	1a(6)	X
<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 .....	1b	X
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here .....		
<b>d</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 2021? .....	1d	X
<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 2021, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2021? .....	2a	X
If "Yes," list the years ▶ _____, _____, _____, _____		
<b>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.) .....	2b	N/A
<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. ▶ _____, _____, _____, _____		
<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? .....	3a	X
<b>b</b> If "Yes," did it have excess business holdings in 2021 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2021.) .....	3b	N/A
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? .....	4a	X
<b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2021? .....	4b	X

**Part VI-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))?		X
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?		X
(3) Provide a grant to an individual for travel, study, or other similar purposes?		X
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	X	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?		X
<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	X	
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
<b>d</b> If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <b>SEE STATEMENT 12</b>	X	
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?		X
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		X
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		X
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? <b>N/A</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?		X

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

**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RUTH M. COLLINS 770 TAMALPAIS DRIVE SUITE 309 CORTE MADERA, CA 94925	TRUSTEE / CONSULTANT 12.00	128,596.	0.	0.
DAVID C CUNEO 770 TAMALPAIS DRIVE SUITE 309 CORTE MADERA, CA 94925	TRUSTEE 10.00	125,000.	0.	0.
DANIEL F. PIOMBO 770 TAMALPAIS DRIVE SUITE 309 CORTE MADERA, CA 94925	TRUSTEE 10.00	125,000.	0.	0.
WILLIAM SMITH 770 TAMALPAIS DRIVE SUITE 309 CORTE MADERA, CA 94925	CEO 40.00	332,019.	30,039.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
AMY FREEMAN - 770 TAMALPAIS DRIVE SUITE 309, CORTE MADERA, CA 94925	DIRECTOR OF PROGRAMS 40.00	188,605.	40,887.	0.
ELISABETH CUTLER - 770 TAMALPAIS DRIVE SUITE 309, CORTE MADERA, CA	SENIOR PROGRAM OFFICER 40.00	153,779.	29,088.	0.
WILLIAM LOCKWOOD - 770 TAMALPAIS DRIVE SUITE 309, CORTE MADERA, CA	SENIOR PROGRAM OFFICER 40.00	154,966.	18,933.	0.
DANIEL GAFF - 770 TAMALPAIS DRIVE SUITE 309, CORTE MADERA, CA 94925	DIRECTOR OF GRANTS MGMT 40.00	144,074.	26,409.	0.
KELLY KENT - 770 TAMALPAIS DRIVE SUITE 309, CORTE MADERA, CA 94925	SENIOR PROGRAM OFFICER 40.00	143,432.	26,954.	0.
<b>Total</b> number of other employees paid over \$50,000				0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
RELEVANT WEALTH ADVISORS - 2 BELVEDERE PLACE, SUITE 350, MILL VALLEY, CA 94941	INVESTMENT MANAGER	2,544,176.

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

**Part VIII-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 VIII-B** Summary of Program-Related Investments

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

Total. Add lines 1 through 3 ..... 0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities .....	1a	393,743,753.
b	Average of monthly cash balances .....	1b	28,561,522.
c	Fair market value of all other assets (see instructions) .....	1c	83,332,314.
d	<b>Total</b> (add lines 1a, b, and c) .....	1d	505,637,589.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) .....	1e	0.
2	Acquisition indebtedness applicable to line 1 assets .....	2	0.
3	Subtract line 2 from line 1d .....	3	505,637,589.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) .....	4	7,584,564.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 .....	5	498,053,025.
6	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5 .....	6	24,902,651.

**Part X 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 IX, line 6 .....	1	24,902,651.
2a	Tax on investment income for 2021 from Part V, line 5 .....	2a	325,724.
b	Income tax for 2021. (This does not include the tax from Part V.) .....	2b	117,997.
c	Add lines 2a and 2b .....	2c	443,721.
3	Distributable amount before adjustments. Subtract line 2c from line 1 .....	3	24,458,930.
4	Recoveries of amounts treated as qualifying distributions .....	4	0.
5	Add lines 3 and 4 .....	5	24,458,930.
6	Deduction from distributable amount (see instructions) .....	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1 .....	7	24,458,930.

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

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 .....	1a	25,913,824.
b	Program-related investments - total from Part VIII-B .....	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes .....	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required) .....	3a	
b	Cash distribution test (attach the required schedule) .....	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4 .....	4	25,913,824.

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

	(a) Corpus	(b) Years prior to 2020	(c) 2020	(d) 2021
1 Distributable amount for 2021 from Part X, line 7				24,458,930.
2 Undistributed income, if any, as of the end of 2021:				
a Enter amount for 2020 only			13,782,561.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2021:				
a From 2016				
b From 2017				
c From 2018				
d From 2019				
e From 2020				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2021 from Part XI, line 4: ▶ \$ 25,913,824.				
a Applied to 2020, but not more than line 2a			13,782,561.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2021 distributable amount				12,131,263.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2021 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2020. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2022				12,327,667.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2016 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2022. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2017				
b Excess from 2018				
c Excess from 2019				
d Excess from 2020				
e Excess from 2021				

Part XIII Private Operating Foundations (see instructions and Part VI-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2021, enter the date of the ruling

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

Table with 5 columns: (a) 2021, (b) 2020, (c) 2019, (d) 2018, (e) Total. Rows include 2a-e (Qualifying distributions) and 3a-d (Alternative tests).

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

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

NONE

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

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

SEE STATEMENT 13

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

c Any submission deadlines:

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

**Part XIV** Supplementary Information (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
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 Paid during the year</b>				
GRANTS APPROVED IN 2021, PAYABLE IN FUTURE YEARS, CA 94925	N/A	PUBLIC	GENERAL	10,575,500.
GRANTS APPROVED IN PRIOR YEARS, PAID IN 2021 (INCLUDED ABOVE), CA 94925	N/A	PUBLIC	GENERAL	-10,200,000.
VARIOUS ORGANIZATIONS SEE ATTACHED DETAILS, CA 94925	N/A	PUBLIC	GENERAL	23,813,878.
<b>Total</b> ..... ► <b>3a</b> 24,189,378.				
<b>b Approved for future payment</b>				
VARIOUS ORGANIZATIONS SEE ATTACHED DETAILS, CA 94925	N/A	PUBLIC	GENERAL	9,660,500.
<b>Total</b> ..... ► <b>3b</b> 9,660,500.				





# Underpayment of Estimated Tax by Corporations

▶ Attach to the corporation's tax return. **FORM 990-PF**

▶ Go to [www.irs.gov/Form2220](http://www.irs.gov/Form2220) for instructions and the latest information.

**2021**

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

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

<b>Part I Required Annual Payment</b>			
1	Total tax (see instructions) .....	1	325,724.
2a	Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1 .....	2a	
2b	Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method .....	2b	
2c	Credit for federal tax paid on fuels (see instructions) .....	2c	
2d	<b>Total.</b> Add lines 2a through 2c .....	2d	
3	Subtract line 2d from line 1. If the result is less than \$500, <b>do not</b> complete or file this form. The corporation does not owe the penalty .....	3	325,724.
4	Enter the tax shown on the corporation's 2020 income tax return. See instructions. <b>Caution:</b> If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5 .....	4	318,584.
5	<b>Required annual payment.</b> Enter the <b>smaller</b> of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3 .....	5	318,584.

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

6	<input type="checkbox"/> The corporation is using the adjusted seasonal installment method.
7	<input checked="" type="checkbox"/> The corporation is using the annualized income installment method.
8	<input checked="" type="checkbox"/> The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

**Part III Figuring the Underpayment**

	(a)	(b)	(c)	(d)	
9 <b>Installment due dates.</b> Enter in columns (a) through (d) the 15th day of the 4th (Form 990-PF filers; Use 5th month), 6th, 9th, and 12th months of the corporation's tax year .....	9	05/15/21	06/15/21	09/15/21	12/15/21
10 <b>Required installments.</b> If the box on line 6 and/or line 7 above is checked, enter the amounts from Sch A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% (0.25) of line 5 above in each column .....	10		97,371.	75,125.	57,967.
11 <b>Estimated tax paid or credited for each period.</b> For column (a) only, enter the amount from line 11 on line 15. See instructions .....	11	194,460.		60,604.	10,000.
<b>Complete lines 12 through 18 of one column before going to the next column.</b>					
12 Enter amount, if any, from line 18 of the preceding column .....	12		194,460.	97,089.	82,568.
13 Add lines 11 and 12 .....	13		194,460.	157,693.	92,568.
14 Add amounts on lines 16 and 17 of the preceding column .....	14				
15 Subtract line 14 from line 13. If zero or less, enter -0- .....	15	194,460.	194,460.	157,693.	92,568.
16 If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0- .....	16		0.	0.	
17 <b>Underpayment.</b> If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18 .....	17				
18 <b>Overpayment.</b> If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column .....	18	194,460.	97,089.	82,568.	

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

LHA For Paperwork Reduction Act Notice, see separate instructions. Form 2220 (2021)

**Part IV Figuring the Penalty**

	(a)	(b)	(c)	(d)
<b>19</b> Enter the date of payment or the 15th day of the 4th month after the close of the tax year, whichever is earlier. <b>(C corporations with tax years ending June 30 and S corporations:</b> Use 3rd month instead of 4th month. <b>Form 990-PF and Form 990-T filers:</b> Use 5th month instead of 4th month.) See instructions .....	<b>19</b>			
<b>20</b> Number of days from due date of installment on line 9 to the date shown on line 19 .....	<b>20</b>			
<b>21</b> Number of days on line 20 after 4/15/2021 and before 7/1/2021 .....	<b>21</b>			
<b>22</b> Underpayment on line 17 x $\frac{\text{Number of days on line 21} \times 3\% (0.03)}{365}$ .....	<b>22</b> \$	\$	\$	\$
<b>23</b> Number of days on line 20 after 6/30/2021 and before 10/1/2021 .....	<b>23</b>			
<b>24</b> Underpayment on line 17 x $\frac{\text{Number of days on line 23} \times 3\% (0.03)}{365}$ .....	<b>24</b> \$	\$	\$	\$
<b>25</b> Number of days on line 20 after 9/30/2021 and before 1/1/2022 .....	<b>25</b>			
<b>26</b> Underpayment on line 17 x $\frac{\text{Number of days on line 25} \times 3\% (0.03)}{365}$ .....	<b>26</b> \$	\$	\$	\$
<b>27</b> Number of days on line 20 after 12/31/2021 and before 4/1/2022 .....	<b>27</b>			
<b>28</b> Underpayment on line 17 x $\frac{\text{Number of days on line 27} \times 3\% (0.03)}{365}$ .....	<b>28</b> \$	\$	\$	\$
<b>29</b> Number of days on line 20 after 3/31/2022 and before 7/1/2022 .....	<b>29</b>			
<b>30</b> Underpayment on line 17 x $\frac{\text{Number of days on line 29} \times \%}{365}$ .....	<b>30</b> \$	\$	\$	\$
<b>31</b> Number of days on line 20 after 6/30/2022 and before 10/1/2022 .....	<b>31</b>			
<b>32</b> Underpayment on line 17 x $\frac{\text{Number of days on line 31} \times \%}{365}$ .....	<b>32</b> \$	\$	\$	\$
<b>33</b> Number of days on line 20 after 9/30/2022 and before 1/1/2023 .....	<b>33</b>			
<b>34</b> Underpayment on line 17 x $\frac{\text{Number of days on line 33} \times \%}{365}$ .....	<b>34</b> \$	\$	\$	\$
<b>35</b> Number of days on line 20 after 12/31/2022 and before 3/16/2023 .....	<b>35</b>			
<b>36</b> Underpayment on line 17 x $\frac{\text{Number of days on line 35} \times \%}{365}$ .....	<b>36</b> \$	\$	\$	\$
<b>37</b> Add lines 22, 24, 26, 28, 30, 32, 34, and 36 .....	<b>37</b> \$	\$	\$	\$
<b>38 Penalty.</b> Add columns (a) through (d) of line 37. Enter the total here and on Form 1120, line 34; or the comparable line for other income tax returns .....	<b>38</b>			\$ 0.

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

**Schedule A Adjusted Seasonal Installment Method and Annualized Income Installment Method**

See instructions.

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

**Part I Adjusted Seasonal Installment Method**

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

		(a)	(b)	(c)	(d)
		First 3 months	First 5 months	First 8 months	First 11 months
1 Enter taxable income for the following periods.					
a Tax year beginning in 2018	1a				
b Tax year beginning in 2019	1b				
c Tax year beginning in 2020	1c				
2 Enter taxable income for each period for the tax year beginning in 2021. See the instructions for the treatment of extraordinary items	2				
3 Enter taxable income for the following periods.		First 4 months	First 6 months	First 9 months	Entire year
a Tax year beginning in 2018	3a				
b Tax year beginning in 2019	3b				
c Tax year beginning in 2020	3c				
4 Divide the amount in each column on line 1a by the amount in column (d) on line 3a	4				
5 Divide the amount in each column on line 1b by the amount in column (d) on line 3b	5				
6 Divide the amount in each column on line 1c by the amount in column (d) on line 3c	6				
7 Add lines 4 through 6	7				
8 Divide line 7 by 3.0	8				
9a Divide line 2 by line 8	9a				
b Extraordinary items (see instructions)	9b				
c Add lines 9a and 9b	9c				
10 Figure the tax on the amt on ln 9c using the instr for Form 1120, Sch J, line 2, or comparable line of corp's return	10				
11a Divide the amount in columns (a) through (c) on line 3a by the amount in column (d) on line 3a	11a				
b Divide the amount in columns (a) through (c) on line 3b by the amount in column (d) on line 3b	11b				
c Divide the amount in columns (a) through (c) on line 3c by the amount in column (d) on line 3c	11c				
12 Add lines 11a through 11c	12				
13 Divide line 12 by 3.0	13				
14 Multiply the amount in columns (a) through (c) of line 10 by columns (a) through (c) of line 13. In column (d), enter the amount from line 10, column (d)	14				
15 Enter any alternative minimum tax (trusts only) for each payment period. See instructions	15				
16 Enter any other taxes for each payment period. See instr.	16				
17 Add lines 14 through 16	17				
18 For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions	18				
19 Total tax after credits. Subtract line 18 from line 17. If zero or less, enter -0-	19				

**Part II Annualized Income Installment Method**

		(a)	(b)	(c)	(d)
		First <u>2</u> months	First <u>4</u> months	First <u>7</u> months	First <u>10</u> months
20	Annualization periods (see instructions)				
21	Enter taxable income for each annualization period. See instructions for the treatment of extraordinary items		1,622,840.	3,354,076.	4,801,317.
22	Annualization amounts (see instructions)	6.000000	3.000000	1.714290	1.200000
23a	Annualized taxable income. Multiply line 21 by line 22		4,868,520.	5,749,859.	5,761,580.
23b	Extraordinary items (see instructions)				
23c	Add lines 23a and 23b		4,868,520.	5,749,859.	5,761,580.
24	Figure the tax on the amount on line 23c using the instructions for Form 1120, Schedule J, line 2, or comparable line of corporation's return		194,741.	229,994.	230,463.
25	Enter any alternative minimum tax (trusts only) for each payment period (see instructions)				
26	Enter any other taxes for each payment period. See instr.				
27	Total tax. Add lines 24 through 26		194,741.	229,994.	230,463.
28	For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions				
29	Total tax after credits. Subtract line 28 from line 27. If zero or less, enter -0-		194,741.	229,994.	230,463.
30	Applicable percentage	25%	50%	75%	100%
31	Multiply line 29 by line 30		97,371.	172,496.	230,463.

**Part III Required Installments**

		1st	2nd	3rd	4th
		installment	installment	installment	installment
<b>Note:</b> Complete lines 32 through 38 of one column before completing the next column.					
32	If only Part I or Part II is completed, enter the amount in each column from line 19 or line 31. If both parts are completed, enter the <b>smaller</b> of the amounts in each column from line 19 or line 31	0.	97,371.	172,496.	230,463.
33	Add the amounts in all preceding columns of line 32. See instructions			97,371.	172,496.
34	<b>Adjusted seasonal or annualized income installments.</b> Subtract line 33 from line 32. If zero or less, enter -0-		97,371.	75,125.	57,967.
35	Enter 25% (0.25) of line 5 on page 1 of Form 2220 in each column. <b>Note:</b> "Large corporations," see the instructions for line 10 for the amounts to enter	79,646.	83,216.	81,431.	81,431.
36	Subtract line 38 of the preceding column from line 37 of the preceding column		79,646.	65,491.	71,797.
37	Add lines 35 and 36	79,646.	162,862.	146,922.	153,228.
38	<b>Required installments.</b> Enter the <b>smaller</b> of line 34 or line 37 here and on page 1 of Form 2220, line 10. See instructions	0.	97,371.	75,125.	57,967.

Form 2220 (2021)

**\*\* ANNUALIZED INCOME INSTALLMENT METHOD USING OPTION 1**

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	
BROKERAGE ACCOUNTS - DIVIDENDS	7,743,588.	0.	7,743,588.	6,771,637.		
BROKERAGE ACCOUNTS - INTEREST	15,511.	0.	15,511.	15,511.		
CRYSTAL CAPITAL FUND SERIES LLC - DIVIDENDS	464,626.	0.	464,626.	296,789.		
CRYSTAL CAPITAL FUND SERIES LLC - INTEREST	839,148.	0.	839,148.	596,515.		
MARCH CAPITAL OPPORTUNITIES FUND III - INTEREST	4,968.	0.	4,968.	4,968.		
MARCH CAPITAL OPPORTUNITIES FUND IV - INTEREST	1,733.	0.	1,733.	1,733.		
RENAISSANCE INSTITUTIONAL EQUITIES FUND -	256,636.	0.	256,636.	152,565.		
RENAISSANCE INSTITUTIONAL EQUITIES FUND -	3,724.	0.	3,724.	1,899.		
SFFRF II - DIVIDENDS	967,028.	0.	967,028.	967,028.		
SFFRF II - INTEREST	87.	0.	87.	87.		
SFFRF III - INTEREST	328,360.	0.	328,360.	328,360.		
TO PART I, LINE 4	10,625,409.	0.	10,625,409.	9,137,092.		

FORM 990-PF	OTHER INCOME			STATEMENT	2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME		
K-1 RENAISSANCE INSTITUTIONAL - OTHER INVESTMENT INCOME	12,562.	12,562.			
K-1 CRYSTAL CAPITAL FUND SERIES LLC - OTHER INVESTMENT INCOME	-666,307.	-666,307.			
K-1 MARCH CAPITAL OPP FUND IV - OTHER INVESTMENT INCOME	-270,035.	-270,035.			

K-1 MARCH CAPITAL OPP FUND IV - RENTAL REAL ESTATE LOSS	-59,684.	-59,684.
K-1 MARCH CAPITAL OPP FUND III - RENTAL REAL ESTATE LOSS	-10,534.	-10,534.
OTHER INCOME	31,691.	0.
K-1 CRYSTAL CAPITAL FUND SERIES LLC - UBTI	764,942.	0.
K-1 MARCH CAPITAL OPP FUND - UBTI	-117,023.	0.
TOTAL TO FORM 990-PF, PART I, LINE 11	-314,388.	-993,998.

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FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	19,818.			2,919.
TO FM 990-PF, PG 1, LN 16A	19,818.			2,919.

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FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	13,105.			6,553.
ACCOUNTING FEES	39,771.			19,885.
ACCOUNTING FEES	65,760.			30,203.
TO FORM 990-PF, PG 1, LN 16B	118,636.			56,641.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	2,544,176.			0.
CONSULTANT FEES	91,119.			97,471.
TO FORM 990-PF, PG 1, LN 16C	2,635,295.			97,471.

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FORM 990-PF	TAXES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	382,496.			0.
FEDERAL UBTI	661,714.			0.
FOREIGN TAXES	109,081.			0.
OTHER TAXES	352.			352.
TO FORM 990-PF, PG 1, LN 18	1,153,643.			352.

FORM 990-PF	OTHER EXPENSES			STATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	135.			90.
CHARITABLE CONTRIBUTIONS (FROM PARTNERSHIPS)	1,055.			1,055.
EQUIPMENT	2,174.			2,171.
INVESTMENT	1,212,105.			0.
INSURANCE	3,297.			3,293.
MEMBERSHIPS	10,867.			10,853.
OFFICE EXPENSE	15,389.			10,211.
SUBSCRIPTION SERVICES	55,390.			55,316.
TELECOMMUNICATIONS	6,627.			6,618.
UTILITIES	3,808.			3,803.
OTHER INVESTMENT EXPENSES (BOOK ONLY)	6,987,857.			0.
TO FORM 990-PF, PG 1, LN 23	8,298,704.			93,410.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 8
DESCRIPTION		AMOUNT
UNREALIZED GAINS AND UNREALIZED FOREIGN CURRENCY ADJUSTMENTS		3,821,123.
TOTAL TO FORM 990-PF, PART III, LINE 5		3,821,123.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE STOCK	322,108,885.	322,108,885.	
OPTIONS	-25,850.	-25,850.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	322,083,035.	322,083,035.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE BONDS (US)	82,026,503.	82,026,503.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	82,026,503.	82,026,503.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SFF REALTY FUND II	FMV	15,293,323.	15,293,323.
SFF REALTY FUND III	FMV	2,860,025.	2,860,025.
MARCH CAPITAL OPPORTUNITY FUND III	FMV	9,962,970.	9,962,970.
CRYSTAL CAPITAL FUND SERIES LLC	FMV	43,972,753.	43,972,753.
MARCH CAPITAL OPPORTUNITY FUND IV	FMV	2,214,602.	2,214,602.
TOTAL TO FORM 990-PF, PART II, LINE 13		74,303,673.	74,303,673.

FORM 990-PF EXPENDITURE RESPONSIBILITY STATEMENT STATEMENT 12  
PART VI-B, LINE 5D

GRANTEE'S NAME

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

GRANTEE'S ADDRESSCASTLECLIFFE  
SAINT ANDREWS FIFE, SCOTLAND, UNITED KINGDOM, KY16 9AJ

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

PURPOSE OF GRANT

TO ESTABLISH A PERMANENT ENDOWMENT FUND TO FURTHER THE MISSION OF THE MAY WONG SMITH TRUST: ESTABLISHING AND MAINTAINING ST. LEONARD'S COLLEGE AS PART OF THE UNIVERSITY OF ST. ANDREWS, AND PROVIDING FELLOWSHIPS, SCHOLARSHIPS, AND PRIZES TO STUDENTS IN THE UNIVERSITY OF ST. ANDREWS, ASSISTING SUCH STUDENTS FINANCIALLY AND GENERALLY LOOKING AFTER THEIR WELFARE.

DATES OF REPORTS BY GRANTEE

12/22/2021 ANNUAL ER REPORT

ANY DIVERSION BY GRANTEE

NO PART HAS BEEN USED FOR OTHER THAN ITS INTENDED PURPOSE

RESULTS OF VERIFICATION

THE FOUNDATION REVIEWED THE GRANT REPORT OF 12/22/2021 BUT DID NOT UNDERTAKE ANY VERIFICATION OF THE GRANTEE'S REPORT AS THERE HAS NOT BEEN ANY REASON TO DOUBT ITS ACCURACY OR RELIABILITY (REG. 53.4945-5(C)).

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FORM 990-PF                      GRANT APPLICATION SUBMISSION INFORMATION                      STATEMENT 13  
PART XIV, LINES 2A THROUGH 2D

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NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

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

TELEPHONE NUMBER

415-332-0166

FORM AND CONTENT OF APPLICATIONS

SEE WEBSITE FOR APPLICATION GUIDELINES: WWW.SMITHCT.ORG

ANY SUBMISSION DEADLINES

NO SUBMISSION DEADLINES.

RESTRICTIONS AND LIMITATIONS ON AWARDS

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

## GENERAL EXPLANATION

STATEMENT 14

## FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

PART VII-B - 2021 RELATED PARTY FOOTNOTE:

## EXPLANATION:

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

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

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

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GENERAL EXPLANATION

STATEMENT 15

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FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

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

EXPLANATION:

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

**May and Stanley Smith Charitable Trust**

94-6622075

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

For Year Ended December 31, 2021

**3a. Paid during the year**

<b>Recipient Name and Address</b>	<b>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</b>	<b>Foundation Status of Recipient</b>	<b>Purpose of Grant or Contribution</b>	<b>Amount Paid in 2021</b>
A Home Within Inc. Oakland, CA	N/A	PC	To provide mental health services for foster youth for as long as needed	\$75,000
A Home Within Inc. Oakland, CA	N/A	PC	To provide mental health services for foster youth for as long as needed	\$50,000
A Sanctuary For Military Families Inc. Granby, CO	N/A	PC	To assist in the reintegration of military families through therapeutic retreats and support	\$100,000
Adoptive Families Association of British Columbia Burnaby, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To support foster youth and adoptive families in British Columbia	\$20,000
Adoptive Families Association of British Columbia Burnaby, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To support foster youth and adoptive families in British Columbia	\$50,000
Advancement Through Opportunity and Knowledge Incorporated Los Angeles, CA	N/A	PC	To support foster youth to graduate high school and succeed in post-secondary education	\$75,000
Affordable Living for the Aging West Hollywood, CA	N/A	PC	To provide low-income older adults with supportive housing and home-sharing options	\$50,000
Affordable Living for the Aging West Hollywood, CA	N/A	PC	To provide low-income older adults with supportive housing and home-sharing options	\$25,000
Alliance For Childrens Rights Los Angeles, CA	N/A	PC	To ensure L.A.'s foster youth have access to stable homes, health care, and education	\$25,000
Alliance For Childrens Rights Los Angeles, CA	N/A	PC	To ensure L.A.'s foster youth have access to stable homes, health care, and education	\$125,000
Alzheimer's Disease and Related Disorders Association Inc. Chicago, IL	N/A	PC	To expand dementia related volunteer caregiver support to five rocky mountain rural states	\$275,000
Alzheimers Family Services Center Huntington Beach, CA	N/A	PC	To provide adult day programming and caregiver services to families impacted by dementia related illnesses	\$25,000
Alzheimers Family Services Center Huntington Beach, CA	N/A	PC	To provide adult day programming and caregiver services to families impacted by dementia related illnesses	\$50,000
Another Chance House Amarillo, TX	N/A	PC	To provide housing and supportive services to homeless veterans in the Texas panhandle	\$40,000
Another Chance House Amarillo, TX	N/A	PC	To upgrade the kitchen in the main house to commercial standards	\$20,000
Arc California Sacramento, CA	N/A	PC	To advocate for and protect the rights of people with I/DD and support their full inclusion in the community	\$100,000
Arc California Sacramento, CA	N/A	PC	To advocate for and protect the rights of people with I/DD and support their full inclusion in the community	\$75,000

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

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

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

Court Appointed Special Advocates Of Travis County Austin, TX	N/A	PC	To support Travis County youth transitioning out of the foster care system	\$50,000
Covenant House Alaska Anchorage, AK	N/A	PC	To support Alaska's youth who are homeless or at risk of homelessness	\$100,000
Denver Indian Family Resource Center Denver, CO	N/A	PC	To support and strengthen Native American families and prevent child welfare involvement	\$50,000
Denver Indian Family Resource Center Denver, CO	N/A	PC	To support and strengthen Native American families and prevent child welfare involvement	\$50,000
Depaul UK London, United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To provide emergency, transitional housing, and support services to at-risk youth in London	\$100,000
Disability In Alexandria, VA	N/A	PC	To support businesses in achieving disability inclusion in the workplace	\$250,000
Disabled Sports USA Rockville, MD	N/A	PC	To encourage low-income young adults with disabilities to engage in sports	\$80,000
Downtown Women's Center Los Angeles, CA	N/A	PC	To provide rapid rehousing and case management to homeless women veterans in Los Angeles	\$100,000
Downtown Women's Center Los Angeles, CA	N/A	PC	To provide general operating support for COVID-related expenses	\$50,000
Duet Partners In Health & Aging Inc. Phoenix, AZ	N/A	PC	To provide volunteer-assisted transportation and support to homebound elders	\$60,000
East Bay Innovations Inc. San Leandro, CA	N/A	PC	To expand private-pay individualized care management by trained local service providers	\$190,000
Ecumenical Center for Religion and Health San Antonio, TX	N/A	PC	To provide mental health services to older adults in rural communities in south Texas	\$25,000
Ecumenical Center for Religion and Health San Antonio, TX	N/A	PC	To provide mental health services to older adults in rural communities in south Texas	\$50,000
Elderhelp of San Diego San Diego, CA	N/A	PC	To support elders' independence and quality of life by providing trained volunteer support	\$65,000
Empowered Aging Pleasant Hill, CA	N/A	PC	To support the highest quality of care for residents of long-term care facilities to prevent abuse	\$75,000
Engage Inc. Burbank, CA	N/A	PC	To offer high quality lifelong learning for low-income elders residing in affordable housing	\$150,000
Engage Inc. Burbank, CA	N/A	PC	To support food distribution and technology needs of elders	\$50,000
Every Child Counts Abaco, Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To provide educational opportunities for students with disabilities and support rebuilding in the aftermath of Hurricane Dorian	\$40,000
Extraordinary Families Los Angeles, CA	N/A	PC	To recruit and support families for foster youth and support youth aging out of foster care	\$100,000
Family Builders By Adoption Oakland, CA	N/A	PC	To find permanent families for children and youth in the Bay Area	\$50,000
Family Eldercare Inc. Austin, TX	N/A	PC	To help elders age in place through coordination of and connections to needed services	\$120,000
Family Eldercare Inc. Austin, TX	N/A	PC	To help elders age in place through coordination of and connections to needed services	\$50,000

Farmer Veteran Coalition Woodland, CA	N/A	PC	To support veterans pursuing careers in agriculture with mentoring and resources	\$100,000
First Nations Development Institute Longmont, CO	N/A	PC	To support COVID-19 relief offered by Native American and Alaskan Native nonprofits and communities to Native people from the Trust's focus populations in its geographic region	\$300,000
First Place for Youth Oakland, CA	N/A	PC	To provide housing and wraparound services to youth transitioning from foster care	\$125,000
Food For Thought Forestville, CA	N/A	PC	To provide nutritious, medically tailored meals and food assistance for low-income elders	\$62,500
Food For Thought Forestville, CA	N/A	PC	To provide nutritious, medically tailored meals and food assistance for low-income elders	\$30,000
Foster Youth in Action Berkeley, CA	N/A	PC	To provide virtual programming and social support to foster youth during the pandemic	\$30,000
Fosterclub Seaside, OR	N/A	PC	To connect current and foster youth to resources and support foster youth leaders to advocate for policy change	\$125,000
Foundation for Students Rising Above San Francisco, CA	N/A	PC	To support foster youth to graduate from college and succeed in the workforce	\$25,000
Foundation for Students Rising Above San Francisco, CA	N/A	PC	To support foster youth to graduate from college and succeed in the workforce	\$50,000
Freedom Service Dogs Inc. Englewood, CO	N/A	PC	To provide custom-trained service dogs for adults with disabilities	\$50,000
Friends of the Children - National Office Portland, OR	N/A	PC	To provide academic support and connections to needed resources for youth and their families	\$50,000
Funders for Lesbian and Gay Issues Inc. New York, CA	N/A	PC	To support the 2021 Funding Forward Conference	\$1,800
Funders Together to End Homelessness Inc Boston, MA	N/A	PC	2021 Membership Dues	\$3,000
Goodwill Industries of New Mexico Albuquerque, NM	N/A	PC	To provide supportive services and employment training and assistance to veterans and family members in New Mexico	\$50,000
Grant A Gift Autism Foundation Las Vegas, NV	N/A	PC	To provide vocational training for transitioning youth and adults with autism in Nevada	\$50,000
Grantmakers for Effective Organizations Washington, DC	N/A	PC	2021 Membership Dues	\$7,390
Grantmakers In Aging Inc. White Plains, NY	N/A	PC	2021 Membership Dues	\$5,500
Guiding Eyes for the Blind Inc. Yorktown Heights, NY	N/A	PC	To provide guide dogs to adults with multiple disabilities that include visual impairment	\$25,000
Head Strong Project Inc. New York, NY	N/A	PC	To provide mental health care to post-9/11 veterans	\$50,000
Hearts & Minds Activity Center San Jose, CA	N/A	PC	To provide social day programs for elders with dementia and support for their family caregivers	\$52,000
Hearts & Minds Activity Center San Jose, CA	N/A	PC	To provide social day programs for elders with dementia and support for their family caregivers	\$16,000

Highline College Foundation Des Moines, WA	N/A	PC	To empower transitioning youth to bridge successfully into the community by offering professional-technical certificates in an inclusive college setting	\$50,000
Hire Heroes USA Alpharetta, GA	N/A	PC	To provide personalized career assistance to transitioning service members, veterans, and spouses	\$250,000
Home Front Military Network Colorado Springs, CO	N/A	PC	To provide a coordinated entry point to access services for military service members, veterans, and their families	\$50,000
Home Front Military Network Colorado Springs, CO	N/A	PC	To provide case management and emergency financial assistance to veterans and military families in Colorado	\$25,000
Homeless Youth Alliance Inc. San Francisco, CA	N/A	PC	To provide supportive services to homeless youth in San Francisco	\$30,000
Homeless Youth Alliance Inc. San Francisco, CA	N/A	PC	provide supportive services to homeless youth in San Francisco	\$40,000
Homes for Families Woodland Hills, CA	N/A	PC	To provide supportive services for veterans and families transitioning into permanent housing	\$80,000
Homeward Bound of Marin Novato, CA	N/A	PC	To provide housing and employment services to homeless veterans in Marin County	\$100,000
Homeward Bound of Marin Novato, CA	N/A	PC	To support construction of the Veterans Supportive Housing project in Novato	\$300,000
Homeward Bound of Marin Novato, CA	N/A	PC	To provide housing and employment services to homeless individuals and families in Marin County	\$35,000
Houston Community College Foundation Houston, TX	N/A	PC	To support independent living and workplace opportunities for college students with I/DD	\$50,000
Human Rights Watch Inc. New York, NY	N/A	PC	To protect residents of long-term care settings from abuse	\$100,000
Immigrant Legal Resource Center San Francisco, CA	N/A	PC	To support immigrant children and families within the child welfare system	\$50,000
Inclusion BC Society New Westminster, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To be the convener, conduit, and collective public voice for local community agencies serving people with I/DD across British Columbia	\$30,000
Inclusion BC Society New Westminster, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To be the convener, conduit, and collective public voice for local community agencies serving people with I/DD across British Columbia	\$60,000
Individuals Now Inc. Social Advocates For Youth Santa Rosa, CA	N/A	PC	To provide housing and supportive services to homeless and former foster youth	\$40,000
Individuals Now Inc. Social Advocates For Youth Santa Rosa, CA	N/A	PC	To provide housing and supportive services to homeless and former foster youth	\$75,000
Inner City Law Center Los Angeles, CA	N/A	PC	To provide free legal services to homeless, low-income veterans in Los Angeles	\$100,000
Inner City Law Center Los Angeles, CA	N/A	PC	To provide free legal services to homeless, low-income individuals in Los Angeles	\$25,000
Institute On Aging San Francisco, CA	N/A	PC	To provide necessary supports and services to enable older adults to age in place	\$50,000

Institute On Aging San Francisco, CA	N/A	PC	To provide necessary supports and services to enable older adults to age in place	\$100,000
Interfaith CarePartners Inc. Houston, TX	N/A	PC	To provide social events and activities for elders with dementia, and respite for caregivers	\$40,000
Interfaith Community Services Inc. Escondido, CA	N/A	PC	To provide mental health services to low-income veterans in North San Diego County	\$125,000
Interfaith Community Services Inc. Escondido, CA	N/A	PC	To service to low-income and homeless individuals in San Diego County	\$75,000
Iraq and Afghanistan Veterans of America Inc. New York, NY	N/A	PC	To provide benefit and services navigation assistance to transitioning veterans and family members	\$50,000
Jewish Community Relations Council of San Francisco Marin & Peninsula San Francisco, CA	N/A	PC	To engage older adults as literacy tutors for K-3 schoolchildren	\$65,000
Jewish Family & Childrens Services San Francisco, CA	N/A	PC	To provide professional and volunteer support for frail elders and their caregivers	\$100,000
Jewish Family Service Houston, TX	N/A	PC	To provide life skills training and supported employment opportunities to adults with disabilities, and family support	\$150,000
Jewish Family Service Houston, TX	N/A	PC	To provide emergency funds for laptops and zoom licenses for 10 staff members and the increase of staff hours and hiring of extra staff	\$50,000
Jewish Family Services Agency of Vancouver Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide care management and comprehensive support services to elders and their families	\$35,000
Jewish Family Services Agency of Vancouver Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide care management and comprehensive support services to elders and their families	\$75,000
John Burton Advocates for Youth San Francisco, CA	N/A	PC	To assist California's foster and homeless youth access education, housing, and health care	\$110,000
Juma Ventures San Francisco, CA	N/A	PC	To help foster youth gain job experience and prepare them for careers	\$50,000
Jumping Mouse Childrens Center Port Townsend, WA	N/A	PC	To provide therapy to at-risk children and support for their caregivers	\$50,000
Just in Time for Foster Youth San Diego, CA	N/A	PC	To support foster youth to become independent and self-sufficient	\$75,000
Justice In Aging Oakland, CA	N/A	PC	To utilize training, policy innovation, and litigation to improve systems affecting elders	\$200,000
Kennesaw State University Foundation Inc. Kennesaw, GA	N/A	PC	To use solution-based journalism to advance child welfare reform in New Mexico	\$115,000
Kindering Center Bellevue, WA	N/A	PC	To support the social and emotional development of infants and toddlers in foster care	\$40,000
Lanakila Pacific Honolulu, HI	N/A	PC	To provide services and supports for adults with disabilities to enhance employment opportunities, community inclusion, and overall quality of life	\$50,000
Larkin Street Youth Services San Francisco, CA	N/A	PC	To support homeless youth and youth at-risk of homelessness in San Francisco	\$40,000
Larkin Street Youth Services San Francisco, CA	N/A	PC	To support homeless youth and youth at-risk of homelessness in San Francisco	\$150,000

Law College Association of the University of Arizona Tucson, AZ	N/A	PC	To provide pro bono legal services for veterans through veterans treatment court in Arizona	\$60,000
Law Foundation of Silicon Valley San Jose, CA	N/A	PC	To provide legal education and free civil legal services for transition-age foster youth	\$75,000
Legal Services For Children Inc. San Francisco, CA	N/A	PC	To provide free legal representation and social work services to children and youth	\$125,000
LIFE Eldercare Inc. Fremont, CA	N/A	PC	To provide transportation and supportive services to assist elders to safely age in place	\$50,000
LifeMoves Menlo Park, CA	N/A	PC	To provide homelessness services to veterans and their families in Silicon Valley	\$100,000
LifeMoves Menlo Park, CA	N/A	PC	To provide services to homeless individuals and families in Silicon Valley	\$50,000
Lifetime Arts New Rochelle, NY	N/A	PC	To engage elders through arts programing and partner with public libraries across Wyoming	\$75,000
Lighthouse for the Blind Inc. Seattle, WA	N/A	PC	To promote workplace advancement and full participation in the community for adults who are deaf-blind	\$40,000
Los Angeles City College Foundation Los Angeles, CA	N/A	PC	To support current and former foster youth to enroll, persist, and graduate from college	\$30,000
Los Angeles LGBT Center Los Angeles, CA	N/A	PC	To provide supportive services to LGBT older adults living in Los Angeles County	\$100,000
Los Angeles LGBT Center Los Angeles, CA	N/A	PC	To provide food distribution services during COVID-19 to LGBT older adults	\$50,000
Lyford Cay Foundation Inc. New York, NY	N/A	PC	To prepare low-income Bahamian students for high school graduation and post-secondary or career technical education	\$100,000
Marbridge Foundation Inc. Manchaca, TX	N/A	PC	To provide adults with disabilities with training and education to achieve personal goals within a residential community setting	\$100,000
Marin Brain Injury Network Larkspur, CA	N/A	PC	To provide a continuum of care for individuals with acquired brain injuries and their families	\$40,000
Marin Center for Independent Living San Rafael, CA	N/A	PC	To bridge the digital divide for people with disabilities and their families, paid caregivers, and provider support staff	\$100,000
Marin Humane Society Novato, CA	N/A	PC	To improve the health and quality of life of low-income seniors through pet care support	\$25,000
Meals on Wheels Diablo Region Walnut Creek, CA	N/A	PC	To provide community engagement, fall prevention, and care management services to older adults	\$30,000
Meals on Wheels Diablo Region Walnut Creek, CA	N/A	PC	To provide community engagement, fall prevention, and care management services to older adults	\$60,000
Mental Health America of Greater Houston Inc. Houston, TX	N/A	PC	To provide peer navigation and mentorship support to veterans in the greater Houston area	\$50,000
Mercy Retirement Care Center Oakland, CA	N/A	PC	To provide food and basic necessities to older adult clients in the Bay Area	\$20,000
Mercy Retirement Care Center Oakland, CA	N/A	PC	To provide nutritious groceries and fresh produce to support older adults' food security	\$35,000
Military Child Education Coalition Harker Heights, TX	N/A	PC	To support the education of military children worldwide	\$100,000

Missoula Area Agency on Aging Missoula, MT	N/A	PC	To provide critical direct services to support elders to safely age in place	\$60,000
Mockingbird Society Seattle, WA	N/A	PC	To provide leadership development and advocacy training to foster and homeless youth	\$95,000
Mountain Home Montana Inc. Missoula, MT	N/A	PC	To support young mothers and their children who are at risk of child welfare involvement	\$30,000
Mountain Home Montana Inc. Missoula, MT	N/A	PC	To support young mothers and their children who are at risk of child welfare involvement	\$40,000
Mt. Carmel Veterans Service Center Colorado Springs, CO	N/A	PC	To support service members, veterans, and their families in the Colorado Springs community	\$100,000
Mt. Carmel Veterans Service Center Colorado Springs, CO	N/A	PC	To support service members, veterans, and their families in the Colorado Springs community	\$50,000
My Possibilities Plano, TX	N/A	PC	To provide employment services and support for adults with I/DD	\$75,000
Mychals Learning Place Hawthorne, CA	N/A	PC	To provide independent living skills and job training/placement for young adults with DD	\$50,000
Na Hoaloha-Maui Interfaith Volunteer Caregivers Wailuku, HI	N/A	PC	To provide trained volunteer support that enables homebound elders to live independently	\$10,000
Na Hoaloha-Maui Interfaith Volunteer Caregivers Wailuku, HI	N/A	PC	To provide trained volunteer support that enables homebound elders to live independently	\$60,000
Nami Arlington, VA	N/A	PC	To provide training for caregivers and family members supporting veterans with mental illness	\$100,000
National Ability Center Park City, UT	N/A	PC	To provide sports, recreation, and educational programs for adults, families, and friends affected by a disability	\$75,000
National Center for Youth Law Oakland, CA	N/A	PC	To improve the educational outcomes of Arizona's foster youth	\$100,000
National Coalition for Homeless Veterans Washington, DC	N/A	PC	2021 Membership Dues	\$1,000
National Domestic Workers Alliance Inc. New York, NY	N/A	PC	To advance state and federal policies that support caregivers across the lifespan	\$250,000
National Low Income Housing Coalition Washington, DC	N/A	PC	To prevent evictions and ensure housing stability for households affected by the pandemic	\$300,000
National Sports Center for the Disabled Inc. Denver, CO	N/A	PC	To provide high quality accessible, adaptive outdoor sports and therapeutic recreation programs	\$40,000
National Veterans Legal Services Program Inc. Washington, DC	N/A	PC	To provide legal assistance to veterans seeking VA benefits and discharge upgrades	\$75,000
Nevada Rural Counties RSVP Program Inc. Carson City, NV	N/A	PC	To support elders and caregivers to meet basic needs and facilitate older adult volunteerism	\$50,000
New Avenues for Youth Inc. Portland, OR	N/A	PC	To support youth who are experiencing or at risk of homelessness in Portland, OR	\$25,000
New Avenues for Youth Inc. Portland, OR	N/A	PC	To support youth who are experiencing or at risk of homelessness in Portland, OR	\$100,000

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

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

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

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

The Mission Continues St. Louis, MO	N/A	PC	To promote veteran reintegration in the Western U.S. through voluntary community service	\$50,000
The Mission Continues St. Louis, MO	N/A	PC	To promote veteran reintegration in the Western U.S. through voluntary community service	\$200,000
The National Military Family Association Inc. Alexandria, VA	N/A	PC	To support military spouse education and professional training opportunities	\$150,000
The Pennsylvania State University University Park, PA	N/A	GOV	To develop and pilot a screening tool to identify veterans at high-risk of failure during transition to post-military life	\$100,000
The Redwoods-A Community of Seniors Mill Valley, CA	N/A	PC	To provide rental assistance to low-income seniors in independent and assisted living facilities	\$35,000
The Salvation Army - Bahamas Nassau, Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To provide individualized instruction and skills training to students with visual impairments	\$35,000
The SCAN Foundation Long Beach, CA	N/A	SO II	To support the State with the implementation of the California Master Plan on Aging	\$100,000
The Society for the Relief of Disabled Children Pokfulam, Hong Kong	N/A	NC (Foreign Public Charity Equivalent)	To subsidize genetic testing for children with disabilities	\$50,000
The UCLA Foundation Los Angeles, CA	N/A	PC	To prepare Los Angeles' foster youth to successfully apply to and enroll in college	\$75,000
The University Corporation San Francisco State San Francisco, CA	N/A	PC	To support foster youth to succeed in and graduate from college	\$20,000
The University Corporation San Francisco State San Francisco, CA	N/A	PC	To support foster youth to succeed in and graduate from college	\$40,000
Treehouse Seattle, WA	N/A	PC	To support foster youth to graduate from high school and transition to independence	\$125,000
Trustees of Boston University Boston, MA	N/A	PC	To support the Women Veterans Network program	\$50,000
Twin Cities Public Television Inc. St. Paul, MN	N/A	PC	To provide information and resources on healthy aging to older adults nationwide	\$100,000
United Friends of the Children Los Angeles, CA	N/A	PC	To provide education support and transitional housing for foster youth	\$100,000
United Friends of the Children Los Angeles, CA	N/A	PC	To provide education support and transitional housing for foster youth	\$50,000
United States Veterans Initiative Los Angeles, CA	N/A	PC	To provide transitional housing and supportive services to homeless women veterans	\$50,000
United States Veterans Initiative Los Angeles, CA	N/A	PC	To provide transitional housing and supportive services to homeless women veterans	\$150,000
University of Delaware Newark, DE	N/A	PC	To identify a collaborative framework for national standards and best practices supporting family future planning	\$55,000
University of Delaware Newark, DE	N/A	PC	To identify a collaborative framework for national standards and best practices supporting family future planning	\$50,000
University of Delaware Newark, DE	N/A	PC	To provide leadership training and support for emerging nonprofit leaders of organizations serving adults with I/DD	\$130,000

University of Hawaii Foundation Honolulu, HI	N/A	PC	To provide scholarships for veteran nursing students in the University of Hawai'i system	\$55,000
University of San Diego San Diego, CA	N/A	PC	To ensure the interests of foster youth are adequately addressed in court and in legislation	\$75,000
University of San Diego San Diego, CA	N/A	PC	To provide free legal services to veterans and advocate for veterans in GI Bill abuse cases	\$50,000
University of Victoria Victoria, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide customized technologies to improve the quality of life for adults with physical and developmental disabilities	\$100,000
Urban Peak Denver Denver, CO	N/A	PC	To support Denver's homeless youth and youth at risk of homelessness	\$30,000
Urban Peak Denver Denver, CO	N/A	PC	To support Denver's homeless youth and youth at risk of homelessness	\$75,000
Utah Health & Human Rights Project Murray, UT	N/A	PC	To support the healing of unaccompanied refugee minors and their foster families	\$30,000
Vancouver Community College Foundation Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide vocational education and training for students with developmental disabilities	\$25,000
Vancouver Community College Foundation Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide vocational education and training for students with developmental disabilities	\$50,000
Verde Valley Caregivers Coalition Sedona, AZ	N/A	PC	To help older adults maintain optimal independence and experience a better quality of life	\$20,000
VTC Enterprises Santa Maria, CA	N/A	PC	To provide life skills and employment training and support for adults with disabilities	\$50,000
West Marin Senior Services Point Reyes Station, CA	N/A	PC	To provide care management and supportive services to help rural elders age in place	\$50,000
Working Wardrobes For A New Start Santa Ana, CA	N/A	PC	To provide supportive services and employment training to low- income veterans and their families in Orange County	\$75,000
Workshops for Warriors Inc. San Diego, CA	N/A	PC	To provide vocational skills training and certification to transitioning veterans in San Diego	\$100,000
World Institute on Disability Berkeley, CA	N/A	PC	To provide self-directed, online planning tools and information on employment, health coverage options, disability benefits, and community living	\$100,000
Yellowstone CASA Inc. Billings, MT	N/A	PC	To provide foster youth with trained volunteers to serve as advocates and mentors	\$30,000
YMCA of San Diego County San Diego, CA	N/A	PC	To support kinship caregivers in San Diego County	\$50,000
Youth Law Center San Francisco, CA	N/A	PC	To ensure children in foster care have the committed and skilled care that they need to thrive	\$95,000
Youth Policy Institute of Iowa Scarsdale, NY	N/A	PC	2021 Membership Dues	\$5,000
Zero8hundred Inc. San Diego, CA	N/A	PC	To provide transition assistance, referrals, and support to service members and their families during the transition to civilian life in San Diego	\$100,000
<b>Total . . . . . ► 3a</b>				<b>\$23,813,878</b>

**3b. Approved during the year for future payment**

<b>Recipient Name and Address</b>	<b>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</b>	<b>Foundation Status of Recipient</b>	<b>Purpose of Grant or Contribution</b>	<b>Future Payment Amount</b>
Adoptive Families Association of British Columbia Burnaby, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To support foster youth and adoptive families in British Columbia	\$50,000
Advancement Through Opportunity and Knowledge Incorporated Los Angeles, CA	N/A	PC	To support foster youth to graduate high school and succeed in post-secondary education	\$75,000
Affordable Living for the Aging West Hollywood, CA	N/A	PC	To provide low-income older adults with supportive housing and home-sharing options	\$50,000
Banner Alzheimer's Foundation Phoenix, AZ	N/A	PC	To provide culturally competent caregiving tools that serve Native American dementia patients	\$70,000
Bay Area Outreach and Recreation Program Berkeley, CA	N/A	PC	To provide sports, recreation, and outdoor adventures to people with physical and visual disabilities	\$45,000
Best Buddies International Inc. Miami, FL	N/A	PC	To provide inclusive, supported employment opportunities in professional work environments for young adults with I/DD	\$150,000
Big Brothers Big Sisters of San Diego County Inc. San Diego, CA	N/A	PC	To provide mentoring support for military children in the San Diego area	\$75,000
Cal State Fullerton Philanthropic Foundation Fullerton, CA	N/A	PC	To support foster youth to graduate from college and prepare them to thrive after graduation	\$50,000
California Youth Connection Emeryville, CA	N/A	PC	To develop foster youths' leadership and advocacy skills	\$125,000
Camp For All Foundation Houston, TX	N/A	PC	To provide a barrier-free camp experience for adults and transitioning youth with disabilities	\$50,000
Canine Companions For Independence Santa Rosa, CA	N/A	PC	To provide trained assistance dogs for adults who are deaf or hard of hearing	\$100,000
Canine Companions For Independence Santa Rosa, CA	N/A	PC	To provide trained assistance dogs for adults who are deaf or hard of hearing	\$100,000
Caregivers Volunteers Assisting the Elderly Ventura, CA	N/A	PC	To provide trained volunteer support that enables homebound elders to live independently	\$60,000
Channel Islands Young Men's Christian Association Santa Barbara, CA	N/A	PC	To provide case management and transitional housing to former foster and homeless youth	\$35,000
Child Advocates of Silicon Valley Inc. Milpitas, CA	N/A	PC	To provide foster youth with trained volunteers who serve as advocates and mentors	\$40,000
Children Now Oakland, CA	N/A	PC	To support policies and practices that enhance child well-being	\$100,000
Children's Rights Inc. New York, NY	N/A	PC	To ensure youth are safe and supported when in out-of-home care	\$100,000
Churchie Foundation Limited East Brisbane, Australia	N/A	NC (Foreign Public Charity Equivalent)	To provide scholarships for Churchie alumni to study in the United States and United Kingdom	\$75,000
Churchie Foundation Limited East Brisbane, Australia	N/A	NC (Foreign Public Charity Equivalent)	To provide scholarships for Churchie alumni to study in the United States and United Kingdom	\$75,000

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

Foundation for Students Rising Above San Francisco, CA	N/A	PC	To support foster youth to graduate from college and succeed in the workforce	\$50,000
Grant A Gift Autism Foundation Las Vegas, NV	N/A	PC	To provide vocational training for transitioning youth and adults with autism in Nevada	\$50,000
Hearts & Minds Activity Center San Jose, CA	N/A	PC	To provide social day programs for elders with dementia and support for their family caregivers	\$52,000
Hire Heroes USA Alpharetta, GA	N/A	PC	To provide personalized career assistance to transitioning service members, veterans, and spouses	\$250,000
Inclusion BC Society New Westminster, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To be the convener, conduit, and collective public voice for local community agencies serving people with I/DD across British Columbia	\$60,000
Institute On Aging San Francisco, CA	N/A	PC	To provide necessary supports and services to enable older adults to age in place	\$100,000
Jewish Family & Childrens Services San Francisco, CA	N/A	PC	To provide professional and volunteer support for frail elders and their caregivers	\$100,000
Jewish Family Services Agency of Vancouver Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide care management and comprehensive support services to elders and their families	\$75,000
John Burton Advocates for Youth San Francisco, CA	N/A	PC	To assist California's foster and homeless youth access education, housing, and health care	\$110,000
Kindering Center Bellevue, WA	N/A	PC	To support the social and emotional development of infants and toddlers in foster care	\$40,000
Law Foundation of Silicon Valley San Jose, CA	N/A	PC	To provide legal education and free civil legal services for transition-age foster youth	\$75,000
Legal Services For Children Inc. San Francisco, CA	N/A	PC	To provide free legal representation and social work services to children and youth	\$125,000
Lighthouse for the Blind Inc. Seattle, WA	N/A	PC	To promote workplace advancement and full participation in the community for adults who are deaf-blind	\$40,000
Lyford Cay Foundation Inc. New York, NY	N/A	PC	To prepare low-income Bahamian students for high school graduation and post-secondary or career technical education	\$100,000
Lyford Cay Foundation Inc. New York, NY	N/A	PC	To prepare low-income Bahamian students for high school graduation and post-secondary or career technical education	\$100,000
Marbridge Foundation Inc. Manchaca, TX	N/A	PC	To provide adults with disabilities with training and education to achieve personal goals within a residential community setting	\$100,000
Marin Brain Injury Network Larkspur, CA	N/A	PC	To provide a continuum of care for individuals with acquired brain injuries and their families	\$40,000
Meals on Wheels Diablo Region Walnut Creek, CA	N/A	PC	To provide community engagement, fall prevention, and care management services to older adults	\$60,000
Military Child Education Coalition Harker Heights, TX	N/A	PC	To support the education of military children worldwide	\$100,000
Mockingbird Society Seattle, WA	N/A	PC	To provide leadership development and advocacy training to foster and homeless youth	\$95,000
My Possibilities Plano, TX	N/A	PC	To provide employment services and support for adults with I/DD	\$75,000
Na Hoaloha-Maui Interfaith Volunteer Caregivers Wailuku, HI	N/A	PC	To provide trained volunteer support that enables homebound elders to live independently	\$60,000

National Center for Youth Law Oakland, CA	N/A	PC	To improve the educational outcomes of Arizona's foster youth	\$100,000
National Domestic Workers Alliance Inc. New York, NY	N/A	PC	To advance state and federal policies that support caregivers across the lifespan	\$250,000
National Veterans Legal Services Program Inc. Washington, DC	N/A	PC	To provide legal assistance to veterans seeking VA benefits and discharge upgrades	\$75,000
New Avenues for Youth Inc. Portland, OR	N/A	PC	To support youth who are experiencing or at risk of homelessness in Portland, OR	\$100,000
New Directions for People with Disabilities Inc. Santa Barbara, CA	N/A	PC	To provide educational and inclusive travel opportunities for adults with disabilities	\$50,000
New Door Ventures San Francisco, CA	N/A	PC	To prepare youth for success in work and life through job training and case management	\$125,000
New Mexico Child Advocacy Networks Albuquerque, NM	N/A	PC	To provide services to youth transitioning out of foster care	\$75,000
NextOp Inc. Houston, TX	N/A	PC	To provide employment support to transitioning veterans in the Gulf Coast region	\$50,000
Northwest Housing Alternatives Inc. Milwaukie, OR	N/A	PC	To provide housing and services to older adults with low incomes to prevent evictions	\$55,000
NPower Inc. Brooklyn, NY	N/A	PC	To provide information technology training and career support to veterans in Texas and California	\$100,000
Openhouse San Francisco, CA	N/A	PC	To provide inclusive housing and supportive services for LGBT elders to age safely in place.	\$125,000
Operation Homefront Inc. San Antonio, TX	N/A	PC	To provide stable transitional housing and support for wounded, ill, and injured veterans and their families	\$100,000
Outdoors For All Foundation Seattle, WA	N/A	PC	To enrich the quality of life for adults and transitioning youth with disabilities through outdoor recreation	\$50,000
Recovery Resource Council Fort Worth, TX	N/A	PC	To provide mental health care for service members, veterans, and their families in North Texas	\$100,000
RightWay Foundation Los Angeles, CA	N/A	PC	To provide employment support and trauma-informed mental health services for foster youth	\$50,000
Rocky Boy Veterans Center Box Elder, MT	N/A	PC	To provide support for veterans on the Rocky Boy's Indian Reservation and surrounding area	\$50,000
Saint Anne's Anglican Church Nassau, Bahamas	N/A	NC (Foreign Public Charity Equivalent)	To support social outreach activities to disadvantaged children and adults in Nassau, Bahamas	\$30,000
San Antonio Lighthouse for the Blind San Antonio, TX	N/A	PC	To provide school to work transition services and training for young adults with visual impairment and/or other disabilities	\$50,000
San Francisco Court Appointed Special Advocate Program San Francisco, CA	N/A	PC	To provide foster youth with trained volunteers who serve as advocates and mentors	\$50,000
Sanctuary of Hope Los Angeles, CA	N/A	PC	To provide comprehensive support services to transition-age youth in South Los Angeles	\$35,000
Senior Hub Inc. Northglenn, CO	N/A	PC	To reduce isolation and enhance independence and well-being among older adults	\$65,000
Soar For Youth Berkeley, CA	N/A	PC	To support foster youth to graduate from high school and enroll in college	\$40,000

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

Zero8hundred Inc. San Diego, CA	N/A	PC	To provide transition assistance, referrals, and support to service members and their families during the transition to civilian life in San Diego	\$100,000
<b>Total . . . . . ▶ 3b</b>				<b>\$9,660,500</b>

**May and Stanley Smith Charitable Trust**

94-6622075

Form 990-PF

For Year Ended December 31, 2021

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INFORMATION WITH RESPECT TO EXPENDITURE RESPONSIBILITY GRANTS

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**Grantee:**

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

**Payments:**

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

\$300,000 Total

**Purpose:**

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

**Amount of Grant Spent by Grantee:**

\$14,416

**Date of Report Received from Grantee:**

12/22/2021 Annual ER Report

**Diversion:**

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

**Verification:**

The foundation reviewed the Grant Report of 12/22/2021 but did not undertake any verification of the grantee's report as there has not been any reason to doubt its accuracy or reliability (Reg. 53.4945-5(c)).