

Return of Private Foundation

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

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Open to Public Inspection

For calendar year 2020, or tax year beginning 01-01-2020, and ending 12-31-2020

Name of foundation: LIVINGRY FOUNDATION
A Employer identification number: 85-0480537
B Telephone number: (415) 561-6400
C If exemption application is pending, check here
D 1. Foreign organizations, check here
D 2. Foreign organizations meeting the 85% test, check here and attach computation ...
E If private foundation status was terminated under section 507(b)(1)(A), check here
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here
I Fair market value of all assets at end of year: \$ 1,942,010
J Accounting method: Accrual

Table with 4 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), with a total of 148,542 for adjusted net income.

**Part II Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	94,083	17,997	17,997
	<b>2</b> Savings and temporary cash investments . . . . .		98,638	98,638
	<b>3</b> Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ <u>65,992</u> Less: allowance for doubtful accounts ▶ _____ <u>0</u>	63,365	65,992	65,992
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	0	1,135,915	1,135,921
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	0	245,633	200,633
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .	1,497,683	124,348	124,348
	<b>14</b> Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)	376,825	298,481	298,481	
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,031,956	1,987,004	1,942,010	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .		3,026	
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue. . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons . . . . .			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22). . . . .	0	3,026	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .	2,031,956	1,983,978	
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .			
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .			
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds . . . . .			
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	2,031,956	1,983,978		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	2,031,956	1,987,004		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) . . . . .	<b>1</b>	2,031,956
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-62,298
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	23,897
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	1,993,555
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	9,577
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	<b>6</b>	1,983,978

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1 a</b> CAPITAL GAIN DISTRIBUTIONS	P	2020-01-01	2020-12-31
<b>b</b> BK OF AMERICA CORP COM, BAC, XXX-XX-XXXX	P	2019-12-02	2020-03-23
<b>c</b> DESIGNER BRANDS INC CL A, DBI, XXX-XX-XXXX	P	2019-09-12	2020-03-17
<b>d</b> DESIGNER BRANDS INC CL A, DBI, XXX-XX-XXXX	P	2019-09-26	2020-03-17
<b>e</b> DESIGNER BRANDS INC CL A, DBI, XXX-XX-XXXX	P	2019-09-12	2020-03-18
DESIGNER BRANDS INC CL A, DBI, XXX-XX-XXXX	P	2019-09-13	2020-03-18
ADOBE SYSTEMS INCORPORATED COM, ADBE, 00724F101	P	2015-09-17	2020-09-03
ALPHABET INC CAP STKCL A, GOOGL, 02079K305	P	2014-05-08	2020-10-27
AMAZON.COM INC, AMZN, XXX-XX-XXXX	P	2014-04-10	2020-10-27
AQUAVENTURE HLDGS LTD SHS, G0443N107	P	2017-06-21	2020-03-10
AT&T INC COM USD1, T, 00206R102	P	2017-10-06	2020-11-02
BROOKFIELD INFRASTRUCTURE CORP COM SUB V, BIPC, 11275Q107	P	2014-06-10	2020-04-02
BROOKFIELD INFRASTRUCTURE PARTNL.P, BIP, G16252101	P	2014-06-10	2020-06-01
CHECK POINT SOFTWARETECHNOLOGIES ORD ILS, CHKP, M22465104	P	2009-12-08	2020-03-17
CLOROX CO COM USD1.00, CLX, XXX-XX-XXXX	P	2017-09-29	2020-04-17
DANAHER CORPORATION COM, DHR, XXX-XX-XXXX	P	2016-12-23	2020-11-02
ELIS EUR1.00 ISIN #FR0012435121 SEDOL #B, ELSSF, F2976F106	P	2017-12-08	2020-06-22
ELIS EUR1.00 ISIN #FR0012435121 SEDOL #B, ELSSF, F2976F106	P	2017-12-08	2020-06-23
ELIS EUR1.00 ISIN #FR0012435121 SEDOL #B, ELSSF, F2976F106	P	2017-12-08	2020-06-24
ELIS EUR1.00 ISIN #FR0012435121 SEDOL #B, ELSSF, F2976F106	P	2017-12-08	2020-06-25
FIRST REPUBLIC BANK SAN FRANCISCO COM US, FRC, 33616C100	P	2014-09-04	2020-07-10
FIRST SOLAR INC, FSLR, XXX-XX-XXXX	P	2019-10-25	2020-11-30
HANNON ARMSTRONG SUSTAINABLE INFRASTRUCT, HASI, 41068X100	P	2018-07-20	2020-12-29
HANNON ARMSTRONG SUSTAINABLE INFRASTRUCT, HASI, 41068X100	P	2018-07-23	2020-12-29
HD SUPPLY HLDGS INC COM, 40416M105	P	2018-04-27	2020-04-13
HD SUPPLY HLDGS INC COM, 40416M105	P	2018-04-26	2020-04-14
INGERSOLL RAND INC COM, IR, 45687V106	P	2015-04-22	2020-03-04
INGERSOLL RAND INC COM, IR, 45687V106	P	2015-04-22	2020-03-06
KORNIT DIGITAL LTD ORD ILS0.01, KRNT, M6372Q113	P	2017-03-16	2020-08-24
KORNIT DIGITAL LTD ORD ILS0.01, KRNT, M6372Q113	P	2017-03-16	2020-08-25
KORNIT DIGITAL LTD ORD ILS0.01, KRNT, M6372Q113	P	2017-03-16	2020-11-02
MATTHEWS PACIFIC TIGER FUND INSTL, MIPTX, XXX-XX-XXXX	P	2018-03-15	2020-03-06
ROYAL DUTCH SHELL ADR EA REP 2 CL A EURO, RDSA, XXX-XX-XXXX	P	2016-07-22	2020-02-27
THERMO FISHER SCIENTIFIC INC, TMO, XXX-XX-XXXX	P	2011-09-01	2020-11-02
TRANE TECHNOLOGIES PLC COM USD1, TT, G8994E103	P	2015-04-22	2020-11-30
VANGUARD SHORT TERM INVMT GRADE ADMIRAL, VFSUX, XXX-XX-XXXX	P	2014-05-02	2020-10-27

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b>	1,410			1,410
<b>b</b>	11,256		20,107	-8,851
<b>c</b>	104		421	-317
<b>d</b>	1,659		6,841	-5,182
<b>e</b>	817		4,635	-3,818
	446		2,528	-2,082
	15,173		2,423	12,750
	7,999		2,596	5,403
	16,434		1,600	14,834
	5,361		3,141	2,220
	8,188		11,607	-3,419
	29		18	11
	28,578		17,659	10,919
	14,937		5,011	9,926
	9,556		6,570	2,986
	5,787		1,974	3,813
	1,174		2,585	-1,411
	2,357		4,944	-2,587
	710		1,556	-846
	2,824		5,973	-3,149
	5,178		2,457	2,721
	9,314		5,256	4,058
	18,670		5,202	13,468
	3,112		865	2,247
	9,088		11,695	-2,607
	9,114		11,456	-2,342
	14		8	6
	4,845		3,006	1,839
	1,484		413	1,071
	1,516		413	1,103
	3,312		826	2,486
	13,244		16,034	-2,790
	17,754		22,008	-4,254
	12,005		1,368	10,637
	14,581		5,236	9,345
	34,970		34,238	732

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (i) over col. (j), if any	
<b>a</b>			1,410
<b>b</b>			-8,851
<b>c</b>			-317
<b>d</b>			-5,182
<b>e</b>			-3,818
			-2,082
			12,750
			5,403
			14,834
			2,220
			-3,419
			11
			10,919
			9,926
			2,986
			3,813
			-1,411
			-2,587
			-846
			-3,149
			2,721
			4,058
			13,468
			2,247
			-2,607
			-2,342
			6
			1,839
			1,071
			1,103
			2,486
			-2,790
			-4,254
			10,637
			9,345
			732

Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	<b>2</b>	70,330
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	}	<b>3</b>	

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

**SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE**

<b>1</b> Reserved	(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
<b>2</b> Reserved			<b>2</b>	
<b>3</b> Reserved			<b>3</b>	
<b>4</b> Reserved			<b>4</b>	
<b>5</b> Reserved			<b>5</b>	
<b>6</b> Reserved			<b>6</b>	
<b>7</b> Reserved			<b>7</b>	
<b>8</b> Reserved			<b>8</b>	

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

Table with 11 main rows and sub-rows (a-e) for credits and payments. Includes fields for exempt foundations, reserved, tax under section 511, subtitle A tax, and tax based on investment income. Total amount owed is 1,165.

Part VII-A Statements Regarding Activities

Table with 10 main rows and sub-rows (a-e) regarding activities. Includes questions about influencing legislation, political purposes, Form 1120-POL filing, and reimbursement. Includes a section for states reported to.

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

<b>11</b>	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions. . . . .				<b>No</b>
<b>12</b>	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions . . . . .				<b>No</b>
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	<b>Yes</b>			
<b>14</b>	The books are in care of ▶ <u>RICCI COMPANY LLC</u> Telephone no. ▶ <u>(505) 338-0800</u> Located at ▶ <u>1030 18TH ST NW ALBUQUERQUE NM 87104</u> ZIP+4 ▶ _____				
<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —check here . . . . . ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . <b>15</b> _____				
<b>16</b>	At any time during calendar year 2020, 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>Yes</b>		<b>No</b>
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign	<b>16</b>			<b>No</b>

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

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

<b>1a</b>	During the year did the foundation (either directly or indirectly):				
	<b>(1)</b> Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
	<b>(2)</b> Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
	<b>(3)</b> Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				
	<b>(4)</b> Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				
	<b>(5)</b> Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
	<b>(6)</b> Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
<b>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions . . . . . Organizations relying on a current notice regarding disaster assistance check here. . . . . ▶ <input type="checkbox"/>	<b>1b</b>			<b>No</b>
<b>c</b>	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020? . . . . .	<b>1c</b>			<b>No</b>
<b>2</b>	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
<b>a</b>	At the end of tax year 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____				
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement—see instructions.) . . . . .	<b>2b</b>			
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____				
<b>3a</b>	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
<b>b</b>	If "Yes," did it have excess business holdings in 2020 as a result of <b>(1)</b> any purchase by the foundation or disqualified persons after May 26, 1969; <b>(2)</b> 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 <b>(3)</b> the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2020.) . . . . .	<b>3b</b>			
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>			<b>No</b>
<b>b</b>	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2020?	<b>4b</b>			<b>No</b>

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

- 5a During the year did the foundation pay or incur any amount to:
(1) Carry on propaganda, or otherwise attempt to influence legislation...
(2) Influence the outcome of any specific public election...
(3) Provide a grant to an individual for travel, study, or other similar purposes?
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)?
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes...
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?
c 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?
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
6b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?
7b If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

Table with 3 columns: Yes, No, and a third column for tracking. Rows correspond to questions 5b, 6b, and 7b.

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

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

Table with 5 columns: (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. Includes entries for Andrew Ungerleider, James D Gollin, and Drummond Pike.

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

Table with 5 columns: (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. All entries are NONE.

Total number of other employees paid over \$50,000. 0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

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

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

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

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

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

	Amount
<b>1</b>	
<b>2</b>	
<b>3</b> All other program-related investments. See instructions.	

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

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	1,324,052
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	140,689
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	1,464,741
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	1,464,741
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	21,971
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	1,442,770
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	72,139

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

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	72,139
<b>2a</b>	Tax on investment income for 2020 from Part VI, line 5. . . . .	<b>2a</b>	744
<b>b</b>	Income tax for 2020. (This does not include the tax from Part VI.)	<b>2b</b>	9,353
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	10,097
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	62,042
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	62,042
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . . .	<b>7</b>	62,042

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26. . . . .	<b>1a</b>	148,542
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	148,542
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions. . . . .	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	148,542

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

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

	(a) Corpus	(b) Years prior to 2019	(c) 2019	(d) 2020
<b>1</b> Distributable amount for 2020 from Part XI, line 7				62,042
<b>2</b> Undistributed income, if any, as of the end of 2020:				
<b>a</b> Enter amount for 2019 only. . . . .			0	
<b>b</b> Total for prior years: 20___, 20___, 20___		0		
<b>3</b> Excess distributions carryover, if any, to 2020:				
<b>a</b> From 2015. . . . .	133,034			
<b>b</b> From 2016. . . . .	75,030			
<b>c</b> From 2017. . . . .	91,819			
<b>d</b> From 2018. . . . .	92,075			
<b>e</b> From 2019. . . . .	77,437			
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	469,395			
<b>4</b> Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ <u>148,542</u>				
<b>a</b> Applied to 2019, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2020 distributable amount				62,042
<b>e</b> Remaining amount distributed out of corpus	86,500			
<b>5</b> Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	555,895			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b. . . . .		0		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions. . . . .		0		
<b>e</b> Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). . . . .	0			
<b>8</b> Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions)	133,034			
<b>9</b> <b>Excess distributions carryover to 2021.</b> Subtract lines 7 and 8 from line 6a	422,861			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2016	75,030			
<b>b</b> Excess from 2017	91,819			
<b>c</b> Excess from 2018. . . . .	92,075			
<b>d</b> Excess from 2019	77,437			
<b>e</b> Excess from 2020	86,500			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2020, enter the date of the ruling

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed
b 85% of line 2a
c Qualifying distributions from Part XII, line 4 for each year listed
d Amounts included in line 2c not used directly for active conduct of exempt activities
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c

Table with 5 columns: (a) 2020, (b) 2019, (c) 2018, (d) 2017, (e) Total. Rows correspond to lines 2a-e and 3a-c.

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

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

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

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

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

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

c Any submission deadlines:

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

**Part XV Supplementary Information** (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
CLIMATE ADVOCATES VARIOUS SANTA FE,NM 87501	NONE	501(C)(3)	GENERAL SUPPORT	1,000
EARTHCARE INTERNATIONAL 6600 VALENTINE WAY SANTA FE,NM 87507	NONE	501(C)(3)	GENERAL SUPPORT	1,000
SANTA FE WALDORF SCHOOL 26 PUESTA DEL SOL SANTA FE,NM 87505	NONE	501(C)(3)	FINANCIAL TUITION SUPPORT FOR UNDERPRIVILEGED FAMILIES	10,000
MAPS 3141 STEVENS CREEK BLVD 4056 SAN JOSE,CA 95117	NONE	501(C)(3)	MT1 THERAPIST TRAINING STUDY	1,000
SOCIAL GOOD FUND INC PO BOX 5473 RICHMOND,CA 94805	NONE	501(C)(3)	GENERAL SUPPORT	6,000
ALLIANCE FOR EARTH PO BOX 8031 SANTA FE,NM 87504	NONE	501(C)(3)	GENERAL SUPPORT	3,000
INSTITUTE FOR REGIONAL EDUCATION PO BOX 2404 SANTA FE,NM 87504	NONE	501(C)(3)	GENERAL SUPPORT	1,000
CCA 1050 OLD PECOS TRAIL SANTA FE,NM 87505	NONE	501(C)(3)	EMERGENCY FUND	1,000
WORLDBLINK FOUNDATION 38 KEYS AVE BOX 17 SAN FRANCISCO,CA 94129	NONE	501(C)(3)	GENERAL SUPPORT	1,000
SANTA FE WATERSHED ASSOCIATION 1413 SECOND ST SUITE 3 SANTA FE,NM 87505	NONE	501(C)(3)	GENERAL SUPPORT	4,400
SANTA FE CANYON PRESERVATION ASSOCIATION 1714 CANYON RD SANTA FE,NM 87501	NONE	501(C)(3)	GENERAL SUPPORT	2,000
SOMOS UN PUEBLO UNIDO 1804 ESPICACITAS ST SANTA FE,NM 87505	NONE	501(C)(3)	GENERAL SUPPORT	2,000
WILD EARTH GUARDIANS 301 N GUADALUPE ST 201 SANTA FE,NM 87501	NONE	501(C)(3)	GENERAL SUPPORT	7,000
THE LAND INSTITUTE 2440 E WATER WELL RD SALINA,KS 67401	NONE	501(C)(3)	GENERAL SUPPORT	1,000
KEYSTONE RESEARCH CENTER 412 N 3RD ST HARRISBURG,PA 17101	NONE	501(C)(3)	GENERAL SUPPORT	2,000
SANTA FE CONSERVATION TRUST PO BOX 23985 SANTA FE,NM 87502	NONE	501(C)(3)	GENERAL SUPPORT	1,000
MOTHER NATURE CENTER 703 DON GASPAR AVE SANTA FE,NM 87505	NONE	501(C)(3)	SUPPORT OF BHAKTI FOOD PROJECT	1,000
PROGEORGIA 151 ELLIS ST ATLANTA,GA 30303	NONE	501(C)(3)	GENERAL SUPPORT	1,000
NEW GEORGIA PROJECT 165 COURTLAND ST SUITE A231 ATLANTA,GA 30303	NONE	501(C)(3)	GENERAL SUPPORT	1,000
<b>Total</b>			<b>3a</b>	<b>47,400</b>
<b>b Approved for future payment</b>				
<b>Total</b>			<b>3b</b>	<b>0</b>





## **Additional Data**

[Return to Form](#)

**Software ID:**

**Software Version:**

**Form 990PF - Special Condition Description:**

**Special Condition Description**

# TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	36,054	18,027		18,027

## TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Identifier	Return Reference	Explanation
ACTIVITIES WITH DISQUALIFIED PERSONS:	FORM 990-PF, PART VII-B	THE PRESIDENT WAS REIMBURSED A TOTAL OF \$2,780 FOR POSTAGE, CHARITABLE DISTRIBUTION & OTHER EXPENSES INCURRED ON BEHALF OF THE FOUNDATION.

## TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIDELITY CONSERVATIVE INCOME BOND	50,100	5,100
DODGE & COX INCOME	54,746	54,746
JP MORGAN BACKED SEC CLASS I	69,459	69,459
VANGUARD SHORT TERM INVMT GRADE ADMIRAL	71,328	71,328

**TY 2020 IRS 990 e-File Render****Name:** LIVINGRY FOUNDATION**EIN:** 85-0480537

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FIDELITY OVERSEAS	72,281	72,281
AON PLC SHS CL A COM	21,127	21,127
PENNON GROUP ORD	19,479	19,479
TRANE TECHNOLOGIES PLC COM	14,516	14,516
AT&T INC COM	11,504	11,504
ADOBE SYSTEMS INCORPORATED COM	15,004	15,004
AKAMI TECHNOLOGIES COM	18,373	18,373
ALPHABET INC CAP STK CL A	70,106	70,106
AMAZON.COM INC	65,139	65,139
APPLE INC COM	68,999	68,999
ARRAY TECHNOLOGIES INC	6,471	6,471
BECTON DICKINSON & CO COM	20,018	20,018
BERKSHIRE HATHAWAY INC COM	34,781	34,781
BLOOM ENERGY CORP COM	14,330	14,330
BROADCOM INC COM	24,082	24,082
BROOKFIELD INFRASTRUCTURE CORP	43,380	43,380
CVS HEALTH CORPORATION	20,490	20,490
CLOROX CO COM	10,096	10,096
COMCAST CORP	31,440	31,440
DANAHER CORPORATION COM	27,768	27,768
DISNEY WALT CO COM	36,236	36,236
ECOLAB INC	16,227	16,227
FACEBOOK INC-CLASS A	40,974	40,974
FIDELITY NATL INFORMATION SERVICES	28,292	28,292
FIRST REPUBLIC BANK DAN FRANCISCO COM	29,386	29,386
FIRST SOLAR INC	14,838	14,838
LKQ CORP	21,144	21,144
LOWES COMPANIES INC COM	32,102	32,102
MICROSOFT CORP	33,363	33,363
MONDELEZ INTL INC COM	23,388	23,388
MONTROSE ENVIRONMENTAL GROUP	9,288	9,288
NVR INC COM	16,319	16,319
PNC FINANCIAL SERVICES GROUP	22,350	22,350
PAYPAL HLDGS INC OM	15,223	15,223
PROGRESSIVE CORP COM	29,664	29,664
SOLARWINDS CORP COM WHEN ISSUED	12,708	12,708
THERMO FISHER SCIENTIFIC INC	23,289	23,289
TRIMBLE INC COM	26,708	26,708
ULTA BEAUTY INC COM	14,352	14,358
UNILEVER PLC SPON ADR NEW	30,180	30,180
VISA INC	32,810	32,810
WASTE MANAGEMENT INC	17,690	17,690

**TY 2020 IRS 990 e-File Render****Name:** LIVINGRY FOUNDATION**EIN:** 85-0480537

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ISHARES PHLX SEMICONDUCTOR ETF	FMV	37,918	37,918
ISHARES TR NASDAQ BIOTECH	FMV	22,724	22,724
KORNIT DIGITAL LTD ORD	FMV	13,370	13,370
AMERICAN TOWER CORP COM	FMV	22,446	22,446
AVALONBAY COMMUNITIES INC COM	FMV	12,032	12,032
HANNON ARMSTRONG SUSTAINABLE	FMV	15,858	15,858

# TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
BIOCHAR ENGINEERING CORP	10,229	10,229	10,229
GROWSTONE LLC PREF SERIES	115,000	115,000	115,000
GROWSTONE LLC PRE SERIES B	83,905	83,905	83,905
GROWSTONE LLC PREF SERIES C	118,969	118,969	118,969
SANTA FE TORTILLA	29,485	-29,622	-29,622
BROOKFIELD INFRASTRUCTURE	19,237	0	0

# TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Description	Amount
NON DEDUCTIBLE EXPENSES K-1	9,577

# TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MEETINGS	3,235	0		3,235
OFFICE EXPENSES	346	173		173
POSTAGE & DELIVERY	97	0		97
PARTNERSHIP DEDUCTIONS	96	96		0
PENALTIES	357	0		0
OTHER EXPENSES	250	0		250

# TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FROM 990-T UBIT	45,537		45,537

# TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Description	Amount
UNREALIZED GAIN/LOSS	23,897

## TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	15,336	15,336		0
PAYROLL PROCESSING FEES	250	0		250
OTHER PROFESSIONAL FEES	3,432	1,716		1,716

## TY 2020 IRS 990 e-File Render

**Name:** LIVINGRY FOUNDATION

**EIN:** 85-0480537

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	5,394	0		5,394
FOREIGN TAXES ON INVESTMENT INCOME	419	419		0
EXCISE TAXES	12,449	0		0