

Return of Private Foundation

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

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Open to Public Inspection

Department of the Treasury Internal Revenue Service

For calendar year 2021, or tax year beginning 01-01-2021, and ending 12-31-2021

Name of foundation: New Priorities Foundation co Third Plateau. A Employer identification number: 91-1805939. B Telephone number: (510) 841-4123. C If exemption application is pending, check here. D 1. Foreign organizations, check here. 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. H Check type of organization: Section 501(c)(3) exempt private foundation. J Accounting method: Accrual.

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include: 1 Contributions, gifts, grants, etc., received (249,910); 2 Check if foundation is not required to attach Sch. B; 3 Interest on savings and temporary cash investments (100); 4 Dividends and interest from securities (242,388); 5a Gross rents; b Net rental income or (loss); 6a Net gain or (loss) from sale of assets not on line 10 (1,310,481); b Gross sales price for all assets on line 6a (8,413,136); 7 Capital gain net income (from Part IV, line 2) (1,310,481); 8 Net short-term capital gain; 9 Income modifications; 10a Gross sales less returns and allowances; b Less: Cost of goods sold; c Gross profit or (loss) (attach schedule); 11 Other income (attach schedule); 12 Total. Add lines 1 through 11 (1,802,879); 13 Compensation of officers, directors, trustees, etc.; 14 Other employee salaries and wages; 15 Pension plans, employee benefits; 16a Legal fees (attach schedule); b Accounting fees (attach schedule) (5,105); c Other professional fees (attach schedule) (97,076); 17 Interest; 18 Taxes (attach schedule) (see instructions) (16,535); 19 Depreciation (attach schedule) and depletion; 20 Occupancy; 21 Travel, conferences, and meetings; 22 Printing and publications; 23 Other expenses (attach schedule) (3,262); 24 Total operating and administrative expenses. Add lines 13 through 23 (121,978); 25 Contributions, gifts, grants paid (555,000); 26 Total expenses and disbursements. Add lines 24 and 25 (676,978); 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements (1,125,901); b Net investment income (if negative, enter -0-) (1,479,318); c Adjusted net income (if negative, enter -0-).

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	196,925	178,871	178,871
	2 Savings and temporary cash investments	80,873	70,530	70,530
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	7,365	11,941	11,941
	10a Investments—U.S. and state government obligations (attach schedule)	925,251	721,248	721,248
	b Investments—corporate stock (attach schedule)	8,077,992	10,011,500	10,011,500
	c Investments—corporate bonds (attach schedule)	1,191,455	915,387	915,387
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	1,014,822	1,303,865	1,303,865
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	500,000	500,000	500,000	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	11,994,683	13,713,342	13,713,342	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue.			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	11,994,683	13,713,342	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
29 Total net assets or fund balances (see instructions)	11,994,683	13,713,342		
30 Total liabilities and net assets/fund balances (see instructions)	11,994,683	13,713,342		

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	11,994,683
2 Enter amount from Part I, line 27a	2	1,125,901
3 Other increases not included in line 2 (itemize) ▶ _____	3	592,758
4 Add lines 1, 2, and 3	4	13,713,342
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	13,713,342

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.)
1 a Sales of Publicly Traded Securities	P	2000-01-01	2021-12-31
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 8,413,136		7,102,655	1,310,481
b			
c			
d			
e			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a			1,310,481
b			
c			
d			
e			

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 }

2	1,310,481
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3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):

If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8

3	
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Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

Exempt operating foundations described in section 4940(d)(2), check here [] and enter [] Bracket for line 1a "N/A" on line 1.
1a Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)
b Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 2
Add lines 1 and 2. 3
Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4
Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5
Credits/Payments:
a 2021 estimated tax payments and 2020 overpayment credited to 2021 6a 11,941
b Exempt foreign organizations—tax withheld at source 6b
c Tax paid with application for extension of time to file (Form 8868) 6c 20,000
d Backup withholding erroneously withheld 6d
7 Total credits and payments. Add lines 6a through 6d 7 31,941
8 Enter any penalty for underpayment of estimated tax. Check here [x] if Form 2220 is attached. 8 144
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. 10 11,234
11 Enter the amount of line 10 to be: Credited to 2022 estimated tax 11,234 Refunded 11

Part VI-A Statements Regarding Activities

1a 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? Yes No
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. Yes No
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.
1c Did the foundation file Form 1120-POL for this year? Yes No
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ (2) On foundation managers. \$
3 Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$
4 Has the foundation engaged in any activities that have not previously been reported to the IRS? Yes No
If "Yes," attach a detailed description of the activities.
5 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 Yes No
6a Did the foundation have unrelated business gross income of \$1,000 or more during the year? Yes No
6b If "Yes," has it filed a tax return on Form 990-T for this year? Yes No
7 Was there a liquidation, termination, dissolution, or substantial contraction during the year? Yes No
If "Yes," attach the statement required by General Instruction T.
8 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? Yes
9 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. Yes
10 Enter the states to which the foundation reports or with which it is registered (see instructions) CA, WA
11 If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation Yes
12 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 taxable year beginning in 2021? See the instructions for Part XIII. If "Yes," complete Part XIII Yes No
13 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses. Yes No

Part VI-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address www.newpriorities.org
14 The books are in care of Third Plateau Telephone no. (510) 841-4123 Located at 127 University Avenue Berkeley CA 94710 ZIP+4
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 -check here and enter the amount of tax-exempt interest received or accrued during the year. 15
16 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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign

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.

1a 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?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(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? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)
b If any answer is "Yes" to 1a(1)-(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions
c Organizations relying on a current notice regarding disaster assistance check here.
d 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?
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
a At the end of tax year 2021, did the foundation have any undistributed income (lines 6d and 6e, Part XII) for tax year(s) beginning before 2021? If "Yes," list the years 20, 20, 20, 20
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement-see instructions.)
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 20, 20, 20, 20
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2021.)
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
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?

Part VI-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 (section 4945(e))?
 - (2)** Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
 - (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)? See instructions
 - (5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?
- 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
- c** Organizations relying on a current notice regarding disaster assistance check here
- d** 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?
If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
If "Yes" to 6b, file Form 8870.
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?
- b** 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?

	Yes	No
5a(1)		No
5a(2)		No
5a(3)		No
5a(4)		No
5a(5)		No
5b		
5d		
6a		No
6b		No
7a		No
7b		
8		No

Part VII 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

(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
Nancy G Schaub 127 University Avenue Berkeley, CA 94710	Pres./Dir 5.00	0		
Anne Schaub Watson 127 University Avenue Berkeley, CA 94710	Sect'y/Dir 2.00	0		
David Schaub 127 University Avenue Berkeley, CA 94710	Treas./Dir 2.00	0		
Tim Schaub 127 University Avenue Berkeley, CA 94710	Director 2.00	0		
Dion Griffin 127 University Avenue Berkeley, CA 94710	CFO 0.25	0		

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

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

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

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

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

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

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

Part VIII- 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 <hr/> <hr/>	
2 <hr/> <hr/>	
3 <hr/> <hr/>	
4 <hr/> <hr/>	

Part VIII- Summary of Program-Related Investments (see instructions)

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

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

Total. Add lines 1 through 3 

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	11,719,707
b	Average of monthly cash balances.	1b	324,957
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	12,044,664
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	
3	Subtract line 2 from line 1d.	3	12,044,664
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	180,670
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	11,863,994
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	593,200

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	593,200
2a	Tax on investment income for 2021 from Part V, line 5.	2a	20,563
b	Income tax for 2021. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	20,563
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	572,637
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	572,637
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	572,637

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	
b	Program-related investments—total from Part VIII-B	1b	
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.	4	

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				572,637
2 Undistributed income, if any, as of the end of 2021:				
a Enter amount for 2020 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2021:				
a From 2016.	537,964			
b From 2017.	967,710			
c From 2018.	304,369			
d From 2019.	119,417			
e From 2020.				
f Total of lines 3a through e.	1,929,460			
4 Qualifying distributions for 2021 from Part XI, line 4: ▶ \$ <u>587,903</u>				
a Applied to 2020, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2021 distributable amount				572,637
e Remaining amount distributed out of corpus	15,266			
5 Excess distributions carryover applied to 2021. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,944,726			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
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				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2022				0
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).				
8 Excess distributions carryover from 2016 not applied on line 5 or line 7 (see instructions)	537,964			
9 Excess distributions carryover to 2022. Subtract lines 7 and 8 from line 6a	1,406,762			
10 Analysis of line 9:				
a Excess from 2017	967,710			
b Excess from 2018	304,369			
c Excess from 2019.	119,417			
d Excess from 2020				
e Excess from 2021	15,266			

Part XIII Private Operating Foundations (see instructions and Part VI-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 2021, 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% (0.85) of line 2a

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

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

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

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

a "Assets" alternative test—enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i)

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

c "Support" alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization (4) Gross investment income

Table with 5 columns: (a) 2021, (b) 2020, (c) 2019, (d) 2018, (e) Total. Rows correspond to lines 2a-e and 3a-c.

Part 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).) Nancy G Schaub

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 **Supplementary Information** (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Catholic Charities of Eastern Washi 12 E 5th Avenue Spokane, WA 99202	N/A	P C	Healthy Food Access & Gardening	10,000
Occidental Arts Ecology Center 15290 Coleman Valley Road Occidental, CA 95465	N/A	P C	Covid Relief	50,000
Women's Voices for the Earth 114 W Pine St Missoula, MT 59807	N/A	P C	General Support	25,000
The Charlie Cart Project 1442-A Walnut Street 469 Berkeley, CA 94709	N/A	P C	General Support	5,000
Earthjustice 50 California Street Suite 50 San Francisco, CA 94111	N/A	P C	General Support	25,000
Inland Northwest Land Conservancy 35 W Main Ave Suite 210 Spokane, WA 99201	N/A	P C	General Support	50,000
Transitions 3128 N Hemlock Spokane, WA 99205	N/A	P C	Solar Installation Project	25,000
Spokane County Environmental Servic 1026 W Broadway 4th Fl Spokane, WA 99260	N/A	P C	Solar Array at the Doris Morrison Learning Center	50,000
Earth Island Institute 2150 Allston Way Suite 460 Berkeley, CA 94704	N/A	P C	U.S. Accelerator	25,000
Earth Island Institute 2150 Allston Way Suite 460 Berkeley, CA 94704	N/A	P C	CA Climate	25,000
Gallatin Valley Land Trust PO Box 7021 Bozeman, MT 59771	N/A	P C	Peets Hill Fundraising Campaign	15,000
Gallatin Valley Land Trust PO Box 7021 Bozeman, MT 59771	N/A	P C	General Support	20,000
Gonzaga University 502 E Boone Avenue Spokane, WA 99258	N/A	P C	Gonzaga Center for Climate, Society & the Environment	100,000
Inquiring Systems Inc 887 Sonoma Ave 23 Santa Rosa, CA 95404	N/A	P C	Soil Centric-General Support	5,000
Missoula Interfaith Collaborative 2205 34th Street Missoula, MT 59801	N/A	P C	General Support	10,000
Missoula Interfaith Collaborative 2205 34th Street Missoula, MT 59801	N/A	P C	Common Ground Missoula - Leadership Development	40,000
The Cultural Conservancy PO Box 29044 San Francisco, CA 94129	N/A	P C	Rightful Return	50,000
The Cultural Conservancy PO Box 29044 San Francisco, CA 94129	N/A	P C	Rightful Return	25,000
Total				555,000
b Approved for future payment				
Total				3b

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

- 1 Program service revenue:
a
b
c
d
e
f
g Fees and contracts from government agencies
2 Membership dues and assessments
3 Interest on savings and temporary cash investments
4 Dividends and interest from securities
5 Net rental income or (loss) from real estate:
a Debt-financed property.
b Not debt-financed property.
6 Net rental income or (loss) from personal property
7 Other investment income
8 Gain or (loss) from sales of assets other than inventory
9 Net income or (loss) from special events:
10 Gross profit or (loss) from sales of inventory
11 Other revenue: a
b
c
d
e

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Includes rows for interest on investments (14, 100) and gain from sales of assets (18, 1,310,481). Total (d) is 1,552,969.

12 Subtotal. Add columns (b), (d), and (e). 13 1,552,969
13 Total. Add line 12, columns (b), (d), and (e). 13 1,552,969
(See worksheet in line 13 instructions to verify calculations.)

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Table with 2 columns: Line No., Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes...

Additional Data

[Return to Form](#)

Software ID: 21013475

Software Version: 2021v4.1

Form 990PF - Special Condition Description:

Special Condition Description

TY 2021 IRS 990 e-File Render

Name: New Priorities Foundation
co Third Plateau

EIN: 91-1805939

Software ID: 21013475

Software Version: 2021v4.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accountinng & Payroll Fees	5,105	1,276	0	3,829

TY 2021 IRS 990 e-File Render

Name: New Priorities Foundation
co Third Plateau

EIN: 91-1805939

Software ID: 21013475

Software Version: 2021v4.1

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Bank of Amer Corp	111,537	111,537
Apple	139,309	139,309
Union Pacific	130,982	130,982
Inter-American Development Bank	117,144	117,144
Kaiser Foundation	143,780	143,780
Avangrid	136,631	136,631
Low Income	136,004	136,004

TY 2021 IRS 990 e-File Render

Name: New Priorities Foundation
co Third Plateau

EIN: 91-1805939

Software ID: 21013475

Software Version: 2021v4.1

Name of Stock	End of Year Book Value	End of Year Fair Market Value
See Stock Statement	9,683,420	9,683,420
Applied Material	102,823	102,823
JP Morgan Chase	113,597	113,597
Morgan Stanley	111,660	111,660

TY 2021 IRS 990 e-File Render

Name: New Priorities Foundation
co Third Plateau

EIN: 91-1805939

Software ID: 21013475

Software Version: 2021v4.1

**US Government Securities - End of
Year Book Value:**

721,248

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

721,248

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

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

TY 2021 IRS 990 e-File Render

Name: New Priorities Foundation
co Third Plateau

EIN: 91-1805939

Software ID: 21013475

Software Version: 2021v4.1

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Accrued Income Receivable	FMV	42,676	42,676
iShares ESG 1-5 YR Corp Bd, 13,530 Sh	FMV	347,045	347,045
iShares TR IS 1 5Yr ETF, 335 Sh	FMV	18,050	18,050
iShares Agency Bond ETF, 845 Sh	FMV	99,009	99,009
Janus Hendrson Mortg, 5,645 Sh	FMV	297,379	297,379
SPDR Short Term Treasury, 7,995 Sh	FMV	254,958	254,958
Greenbacker	FMV	244,748	244,748

TY 2021 IRS 990 e-File Render

Name: New Priorities Foundation
co Third Plateau

EIN: 91-1805939

Software ID: 21013475

Software Version: 2021v4.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank Fees	316			316
Filing Fee	150			150
Insurance	2,568			1,380
Web & Domain Expenses	228			228

TY 2021 IRS 990 e-File Render

Name: New Priorities Foundation
co Third Plateau

EIN: 91-1805939

Software ID: 21013475

Software Version: 2021v4.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foundation Management Fees	36,000	9,000	0	27,000
Investment Management Fees	61,076	61,076	0	0

TY 2021 IRS 990 e-File Render

Name: New Priorities Foundation
co Third Plateau

EIN: 91-1805939

Software ID: 21013475

Software Version: 2021v4.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise Tax Provision	14,236			
Foreign Dividend Taxes	2,299	2,299		