

990-PF

Form
Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

For calendar year 2022, or tax year beginning 01-01-2022 , and ending 12-31-2022

Name of foundation THE RUDOLPH J & DAPHNE A MUNZER FOUNDATION		A Employer identification number 33-0686779	
Number and street (or P.O. box number if mail is not delivered to street address) 3450 EAST SPRING STREET 216	Room/suite	B Telephone number (see instructions) (562) 912-7732	
City or town, state or province, country, and ZIP or foreign postal code LONG BEACH, CA 90806		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☒ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ <u>88,179,916</u>		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	505,000			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities		1,893,150		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	674,452			
	b Gross sales price for all assets on line 6a <u>11,958,165</u>				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	0	606,039		
	12 Total. Add lines 1 through 11	1,179,452	2,499,189	0	
	13 Compensation of officers, directors, trustees, etc.	0	0	0	0
	14 Other employee salaries and wages	231,960	23,195	0	208,765
	15 Pension plans, employee benefits	61,624	6,162	0	55,462
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	35,950	16,389	0	19,561
	c Other professional fees (attach schedule)	545,233	501,733	0	23,669
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	203,892	140,507	0	0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	16,620	0	0	13,057
	21 Travel, conferences, and meetings	379	0	0	379
	22 Printing and publications				
	23 Other expenses (attach schedule)	59,329	0	0	50,244
	24 Total operating and administrative expenses. Add lines 13 through 23	1,154,987	687,986	0	371,137
	25 Contributions, gifts, grants paid	4,454,700			4,223,050
	26 Total expenses and disbursements. Add lines 24 and 25	5,609,687	687,986	0	4,594,187
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-4,430,235			
	b Net investment income (if negative, enter -0-)		1,811,203		
c Adjusted net income (if negative, enter -0-)				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		373,909	65,361	65,361
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶ <u>75,000</u>				
		Less: allowance for doubtful accounts ▶ _____			75,000	75,000
	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		1,360	31,883	31,883
	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)				
	c	Investments—corporate bonds (attach schedule)		8,862	0	0
	11	Investments—land, buildings, and equipment: basis ▶ _____				
	Less: accumulated depreciation (attach schedule) ▶ _____					
12	Investments—mortgage loans					
13	Investments—other (attach schedule)		108,343,819	87,998,484	87,998,484	
14	Land, buildings, and equipment: basis ▶ <u>10,500</u>					
	Less: accumulated depreciation (attach schedule) ▶ <u>1,312</u>		4,167	9,188	9,188	
15	Other assets (describe ▶ _____)					
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		108,732,117	88,179,916	88,179,916	
Liabilities	17	Accounts payable and accrued expenses		151,593	117,603	
	18	Grants payable		112,500	243,750	
	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).		264,093	361,353	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒					
	24	Net assets without donor restrictions		108,468,024	87,818,563	
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☐					
	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)		108,468,024	87,818,563	
	30	Total liabilities and net assets/fund balances (see instructions) .		108,732,117	88,179,916	

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	108,468,024
2	Enter amount from Part I, line 27a	2	-4,430,235
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	104,037,789
5	Decreases not included in line 2 (itemize) ▶ _____	5	16,219,226
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	87,818,563

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 PUBLICLY TRADED SECURITIES		2021-12-30	2022-12-31
b SUSTAINABLE MULTI-ASSET GROWTH FUND	P	2021-12-30	2022-12-31
c SUSTAINABLE BOND FUND	P	2021-12-30	2022-12-31
d HALBERT HARGROVE		2017-12-15	2022-12-31
e PRIVATE MARKETS FUND	P	2021-12-30	2022-12-31

(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 11,899,371		11,899,371	0
b		5,286,682	-5,286,682
c		901,316	-901,316
d 9,340	0	10,526	-1,186
e 49,454			49,454

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			0
b			-5,286,682
c			-901,316
d			-1,186
e			49,454

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

-6,139,730

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

Part V

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

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.			
		Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		1	25,176
b		All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0
3		Add lines 1 and 2.		3	25,176
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.		5	25,176
6		Credits/Payments:			
a		2022 estimated tax payments and 2021 overpayment credited to 2022	6a	50,957	
b		Exempt foreign organizations—tax withheld at source	6b	0	
c		Tax paid with application for extension of time to file (Form 8868)	6c	0	
d		Backup withholding erroneously withheld	6d	0	
7		Total credits and payments. Add lines 6a through 6d	7	50,957	
8		Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2221 is attached.	8	0	
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	25,781	
11		Enter the amount of line 10 to be: Credited to 2023 estimated tax Refunded	11	0	

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
				1a		No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.				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.		1b		No
c		Did the foundation file Form 1120-POL for this year?		1c		No
d		Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0 (2) On foundation managers. \$ 0				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		2		No
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year?		4b		
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		5		No
6		Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes	
7		Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV.		7	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see instructions) CA				
b		If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation.		8b	Yes	
9		Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2022 or the taxable year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII		9		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10		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.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>HTTPS://MUNZERFDN.ORG/</u>	13	Yes	
14	The books are in care of ▶ <u>ZAYDA L GARCIA</u> Telephone no. ▶ <u>(562) 912-7732</u> Located at ▶ <u>3450 E SPRING STREET SUITE 216 LONG BEACH CA</u> ZIP+4 ▶ <u>90806</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			
16	At any time during calendar year 2022, 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?	16	Yes	No
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.			Yes	No
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?	1a(1)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)		No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)		No
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		
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 2022?	1d		No
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 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?. If "Yes," list the years ▶ 20____, 20____, 20____, 20____	2a		No
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.)	2b		
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?	3a		No
b	If "Yes," did it have excess business holdings in 2022 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 2022.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2022?	4b		No

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))?

5a(1)

No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

5a(2)

No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

5a(3)

No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

5a(4)

No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

5a(5)

No

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

5b

c Organizations relying on a current notice regarding disaster assistance check

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?

5d

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?

6a

No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

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?

7a

No

b If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

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?

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
DANIEL WARREN MUNZER 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	PRESIDENT 4.00	0	0	0
ANNE BOURNE 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	VICE PRESIDENT 4.00	0	0	0
DANA BOURNE 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	DIRECTOR 4.00	0	0	0
JOHN G BOURNE 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	DIRECTOR 4.00	0	0	0
KIRSTEN BOURNE 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	DIRECTOR 4.00	0	0	0
DANIEL WAYNE MUNZER 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	DIRECTOR 4.00	0	0	0
ELIZABETH MUNZER 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	DIRECTOR 4.00	0	0	0
JAMES R MUNZER 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	DIRECTOR 4.00	0	0	0
JEFFREY R MUNZER 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	DIRECTOR 4.00	0	0	0
NICOLE C MUNZER FINGLETON 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	DIRECTOR 4.00	0	0	0

2

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ZAYDA GARCIA 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	EXECUTIVE DIRECTOR 40.00	116,103	14,731	0
MONICA OCHOA 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	PROGRAM ASSOCIATE 40.00	63,790	12,452	0
JERI LYNNE CULLISON 3450 EAST SPRING STREET SUITE 216 LONG BEACH, CA 90806	ADMINISTRATIVE ASSIS 32.00	50,720	12,717	0
Total 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 (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
RUSSELL INVESTMENTS 1301 2ND AVENUE 18TH FLOOR SEATTLE,WA 98101	INVESTMENT MANAGEMENT	524,409

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

0

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	
2	
3	
4	

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	
2	
All other program-related investments. See instructions.	
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	93,671,764
b	Average of monthly cash balances.	1b	311,638
c	Fair market value of all other assets (see instructions).	1c	116,071
d	Total (add lines 1a, b, and c).	1d	94,099,473
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	94,099,473
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	1,411,492
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	92,687,981
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	4,634,399

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	4,634,399
2a	Tax on investment income for 2022 from Part V, line 5.	2a	25,176
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	25,176
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	4,609,223
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	4,609,223
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1. . . .	7	4,609,223

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	4,594,187
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	4,594,187

Part XII

Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7					4,609,223
2 Undistributed income, if any, as of the end of 2022:					
a Enter amount for 2021 only.				0	
b Total for prior years: 20____, 20____, 20____			0		
3 Excess distributions carryover, if any, to 2022:					
a From 2017.		1,418,095			
b From 2018.		2,340,210			
c From 2019.		4,406,798			
d From 2020.		76,709			
e From 2021.					
f Total of lines 3a through e.		8,241,812			
4 Qualifying distributions for 2022 from Part XI, line 4: ▶ \$ 4,594,187					
a Applied to 2021, but not more than line 2a				0	
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 2022 distributable amount					4,594,187
e Remaining amount distributed out of corpus		0			
5 Excess distributions carryover applied to 2022. (If an amount appears in column (d), the same amount must be shown in column (a).)		15,036			15,036
6 Enter the net total of each column as indicated below:					
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		8,226,776			
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 2021. Subtract line 4a from line 2a. Taxable amount—see instructions.				0	
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023					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).		0			
8 Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions)		1,403,059			
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a		6,823,717			
10 Analysis of line 9:					
a Excess from 2018		2,340,210			
b Excess from 2019		4,406,798			
c Excess from 2020.		76,709			
d Excess from 2021					
e Excess from 2022					

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 2022, 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 IX 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

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).)

b

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

2

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

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

a

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

THE RUDOLPH J AND DAPHNE A MUNZER F
3450 E SPRING STREET SUITE 216
LONG BEACH,CA 90806
(562) 912-7732

b

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

APPLICATIONS SHOULD BE COMPLETED ELECTRONICALLY THROUGH THE FOLLOWING WEBSITE:
HTTPS://MUNZERFDN.ORG/HOW-TO-APPLY/APPLY/

c

Any submission deadlines:

THE APPLICATION PERIOD IS OCTOBER 31 - NOVEMBER 4.

d

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

ORGANIZATIONS SUBMITTING REQUESTS MUST MEET THE FOLLOWING ELIGIBILITY CRITERIA: TAX EXEMPT UNDER IRS SECTION 501(C)(3) PROVIDE SERVICES THAT ADDRESS PRESSING NEEDS AT A COMMUNITY-BASED LEVEL PROGRAMS AND/OR SERVICES MUST BE PROVIDED WITHIN AN IDENTIFIED MUNZER FOUNDATION COMMUNITY

Form 990-PF (2022)

Part 1 Supplementary Information (continued)					Page 11
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					
1736 FAMILY CRISIS CENTER 2136 ARLINGTON AVENUE STE 200 LOS ANGELES, CA 90018		PC	LONG BEACH SHELTER PROGRAM	50,000	
ABILIS 50 GREENVILLE ST GREENWICH, CT 06831		PC	ABILIS EARLY INTERVENTION BIRTH TO THREE PROGRAM	53,000	
ABILITYFIRST 789 NORTH FAIR OAKS AVENUE PASADENA, CA 91103		PC	ABILITYFIRST LONG BEACH CENTER AFTER SCHOOL PROGRAM FOR CHILDREN AND YOUTH	25,000	
ABLE ARTS WORK 3626 E PACIFIC COAST HWY LONG BEACH, CA 90804		PC	CREATIVE HEALTH AND WELLNESS CLINIC	40,000	
AQUARIUM OF THE PACIFIC 100 AQUARIUM WAY LONG BEACH, CA 90802		PC	OCEAN SCIENCE EDUCATION PROGRAM	40,000	
ARTS COUNCIL FOR LONG BEACH 115 PINE AVE STE 350 LONG BEACH, CA 90802		PC	EYE ON DESIGN FOR SCHOOLS, AND PASSPORT TO THE ARTS FOR LEADERSHIP ACADEMIES	25,000	
ASSISTANCE LEAGUE OF LONG BEACH 6220 E SPRING STREET LONG BEACH, CA 90815		PC	OPERATION SCHOOL BELL	50,000	
ASSISTANCE LEAGUE OF LONG BEACH 6220 E SPRING STREET LONG BEACH, CA 90815		PC	ORTHODONTIC PROGRAM	50,000	
BILLION OYSTER PROJECT 10 SOUTH STREET SLIP 7 NEW YORK, NY 10004		PC	BILLION OYSTER PROJECT SCHOOLS NETWORK	20,000	
BOSS INC 7941 E CRAMER STREET LONG BEACH, CA 90808		PC	BOSS/BEACH LEGENDS ZONE - STEM INITIATIVE	25,000	
BOY SCOUTS OF AMERICA LONG BEACH AREA COUNCIL 401 E 37TH STREET LONG BEACH, CA 90807		PC	LONG BEACH SCOUTBEACH 2022-23	20,000	
BOYS & GIRLS CLUBS OF LONG BEACH 3635 LONG BEACH BOULEVARD LONG BEACH, CA 90807		PC	STEM PROGRAM	60,000	
CALIFORNIA CONFERENCE FOR EQUALITY AND JUSTICE INC 3605 LONG BEACH BOULEVARD SUITE 100 LONG BEACH, CA 90807		PC	CONSCIOUS CLASSROOMS & CCEJ PAY EQUITY	60,000	
CAMP NUGGET CALIFORNIA STATE UNIVERSITY LONG BEACH 1250 BELLFLOWER BLVD MS 5605 ETC-200 LONG BEACH, CA 908405605		PC	CAMP NUGGET	20,000	
CASA YOUTH SHELTER 10911 REAGAN STREET LOS ALAMITOS, CA 90720		PC	CASA YOUTH SHELTERS CLINICAL AND CASE MANAGEMENT PROGRAM EXPANSION	35,000	
CENTRO CHA INC 1633 LONG BEACH BLVD LONG BEACH, CA 90813		PC	BUILDING STRONG AND HEALTHY FAMILIES	60,000	
CENTURY VILLAGES AT CABRILLO 1000 CORPORATE PT CULVER CITY, CA 90230		PC	CENTURYS OASIS RESIDENTIAL SERVICES	50,000	
CHILD LANE (COMPREHENSIVE) 2501 CHERRY AVE STE 350 LONG BEACH, CA 90755		PC	CHILD LANE: LONG BEACH ECE PROGRAM	50,000	
CHILDREN'S DENTAL HEALTH CLINIC 455 E COLUMBIA STREET STE 32 LONG BEACH, CA 90806		PC	MULTI-SPECIALTY DENTAL TREATMENT FOR UNDERSERVED CHILDREN OF LONG BEACH & CATALINA ISLAND	100,000	
CHILDREN'S INSTITUTE (CII) 2121 WEST TEMPLE STREET LOS ANGELES, CA 90026		PC	TRAUMA INFORMED SUPPORT SERVICES FOR FAMILIES	40,000	
CHILDREN'S LEARNING CENTERS OF FAIRFIELD COUNTY INC 64 PALMERS HILL ROAD STAMFORD, CT 069022113		PC	NUTRITION	35,000	
CHILDREN TODAY 2951 LONG BEACH BLVD LONG BEACH, CA 90806		PC	CHILDREN TODAY'S ECOHOUSE	40,000	
CHRISTIAN OUTREACH IN ACTION 515 E 3RD ST LONG BEACH, CA 90802		PC	COA BABY FOOD AND DIAPER PROGRAM FOR LOW-INCOME WOMEN AND CHILDREN	20,000	
CSU LONG BEACH SCHOOL OF SOCIAL WORK 1250 BELLFLOWER BLVD SSPA 161 LONG BEACH, CA 908404602		PC	STRENGTHENING YOUTH RESILIENCE IN LONG BEACH	30,000	
ECE WORKFORCE PROJECT (CHILD LANE) 2545 PACIFIC AVE LONG BEACH, CA 90806		PC	LONG BEACH ECE WORKFORCE PROFESSIONALIZATION AND ADVOCACY	118,750	
EDUCARE LA AT LONG BEACH - LONG BEACH EDUCATION FOUNDATION 4840 LEMON AVE LONG BEACH, CA 90807		PC	ADDRESSING COMPENSATION FOR EARLY CHILDHOOD EDUCATORS: ENSURING ECE PROGRAM QUALITY	40,000	
ELEVATE YOUR GAME 2019 E 120TH ST LOS ANGELES, CA 90059		PC	MENTORING PROGRAM IN LONG BEACH	10,000	
EXTRAORDINARY FAMILIES 221 N ARDMORE AVE LOS ANGELES, CA 90004		PC	COMPREHENSIVE CONTINUUM OF EXPANDED SERVICES FOR LONG BEACH FOSTER CHILDREN & FORMER FOSTER YOUTH	40,000	
FAMILIES UNITING FAMILIES 525 E 7TH STREET SUITE 115 LONG BEACH, CA 90813		PC	PROJECT FATHERHOOD	50,000	
FOOD FINDERS INC 10539 HUMBOLDT STREET LOS ALAMITOS, CA 90720		PC	FOOD RESCUE AND DISTRIBUTION	50,000	
FOR THE CHILD INC 4565 CALIFORNIA AVENUE LONG BEACH, CA 90807		PC	CHILD ABUSE & NEGLECT SAFETY NET PROGRAM (CAP)	50,000	
FRESHFARM MARKETS INC 1380 MONROE ST NW 605 WASHINGTON, DC 20010		PC	FOODPRINTS AND FARM-TO-CHILD CARE PROGRAMMING	70,000	
GOODWILL SERVING THE PEOPLE OF SOUTHERN LOS ANGELES COUNTY 800 W PACIFIC COAST HIGHWAY LONG BEACH, CA 90806		PC	HEALTHCARE CAREER TRAINING FOR LOW-INCOME HIGH SCHOOL STUDENTS IN LONG BEACH	85,000	
GROUND EDUCATION 6475 E PACIFIC COAST HIGHWAY 234 LONG BEACH, CA 90803		PC	SCHOOL-BASED OUTDOOR ENVIRONMENTAL EDUCATION PROGRAM	30,000	
HABITAT FOR HUMANITY OF GREATER LOS ANGELES 8739 ARTESIA BLVD BELLFLOWER, CA 90706		PC	WASHINGTON NEIGHBORHOOD REVITALIZATION	30,000	
HUMAN-I-T 100 W BROADWAY STE 3000NEWORC C/O EILEEN HARRIS LONG BEACH, CA 90802		PC	EQUIPMENT	30,000	
INSPIRA INC 141 FRANKLIN STREET STAMFORD, CT 06901		PC	CHILDRENS SERVICES & EARLY CHILDHOOD AND PARENTING PROGRAM	50,000	
JEWISH FAMILY & CHILDREN'S SERVICE OF LONG BEACH & WEST ORANGE CO 3801 E WILLOW ST LONG BEACH, CA 908151734		PC	LOW-INCOME COUROSING PROGRAM FOR RESIDENTS OF LONG BEACH	20,000	
KHMER GIRLS IN ACTION 1085 REDONDO AVE LONG BEACH, CA 90804		PC	LEADERSHIP DEVELOPMENT PROGRAM	35,000	
LB CAP 117 W VICTORIA ST LONG BEACH, CA 90805		PC	LEADERSHIP ARTS MENTORING PROGRAM (LAMP)	50,000	
LEADERSHIP LONG BEACH 4401 ATLANTIC AVE STE 200 LONG BEACH, CA 90807		PC	LEADERSHIP LONG BEACH MIDDLE SCHOOL & HIGH SCHOOL PROGRAMS	50,000	
LEGAL AID FOUNDATION OF LOS ANGELES 1550 W 8TH STREET LOS ANGELES, CA 90017		PC	GREATER LONG BEACH COMMUNITY MEDICAL-LEGAL PARTNERSHIP	70,000	
LINC HOUSING 3590 ELM AVENUE LONG BEACH, CA 90807		PC	YOUTH EMPOWERMENT: SUPPORTING CHILDREN 0 12 YEARS OF LOW-INCOME FAMILIES	40,000	
LONG BEACH BLVD (BETTER LEARNING FOR ALL STUDENTS TODAY) 4201 LONG BEACH BLVD SUITE 201 LONG BEACH, CA 90807		PC	ACADEMIC AND SOCIO-EMOTIONAL MENTORING OF AT-RISK, YET VULNERABLE, YOUTH IN LONG BEACH	40,000	
LONG BEACH BLUES SOCIETY 2601 E OCEAN BLVD STE 201 LONG BEACH, CA 908021117		PC	BLUES IN THE SCHOOLS & BEDSIDE BEATS	10,000	
LONG BEACH CALL - LONG BEACH EDUCATION FOUNDATION 1515 HUGHES WAY LONG BEACH, CA 90810		PC	CAREER EXPLORATION, ACTIVITIES & EVENTS	10,000	
LONG BEACH DAY NURSERY 1548 CHESTNUT AVE LONG BEACH, CA 90813		PC	LONG BEACH DAY NURSERY'S WEST BRANCH RENOVATION	75,000	
LONG BEACH EARLY CHILDHOOD EDUCATION COMMITTEE 13300 CROSSROADS PARKWAY NORTH STE 450 CITY OF INDUSTRY, CA 91746		PC	THE LBCE COMMITTEE: BUILDING COMMUNITY, STRENGTHENING PROVIDERS, LEADING THE FIELD	20,000	
LONG BEACH IMMIGRANT RIGHTS COALITION - COMMUNITY PARTNERS 1000 N ALAMEDA ST STE 240 LOS ANGELES, CA 90012		PC	THRIVING IMMIGRANT PARENT LEADERSHIP ACADEMY	30,000	
LONG BEACH MUSEUM OF ART FOUNDATION 2300 E OCEAN BLVD LONG BEACH, CA 90803		PC	KIDS/STOOLS ARTS EDUCATION PROGRAM	40,000	
LONG BEACH ORGANIC INC 5115 MARINA PACIFICA DRIVE NORTH LONG BEACH, CA 90803		PC	ZAFERIA JUNCTION COMMUNITY GARDEN ALLIABILITIES RENOVATION	10,000	
LONG BEACH PUBLIC LIBRARY FOUNDATION 200 W BROADWAY LONG BEACH, CA 90802		PC	LONG BEACH PUBLIC LIBRARY FAMILY LEARNING CENTER PROGRAM	90,000	
LONG BEACH SYMPHONY ASSOCIATION 249 E OCEAN BLVD SUITE 200 LONG BEACH, CA 90802		PC	LONG BEACH SYMPHONY YOUTH STREAMING CONCERTS	30,000	
MAYOR'S FUND FOR EDUCATION - COMMUNITY PARTNERS 1000 N ALAMEDA ST STE 240 LOS ANGELES, CA 900121804		PC	READY LB ECE - READY/ROSTIEB/ECE SYSTEMS ALIGNMENT PROJECT	40,000	
MEMORIAL MEDICAL FOUNDATION 2801 ATLANTIC AVE LONG BEACH, CA 90806		PC	MILLER CHILDRENS NICU FOLLOW-UP OUTPATIENT CLINIC	100,000	
MENTAL HEALTH AMERICA OF LOS ANGELES 200 PINE AVENUE STE 400 LONG BEACH, CA 90802		PC	A FIRST STEP TOWARD INDEPENDENT LIVING	100,000	
MOMENTUM AGENCIES 6430 INDEPENDENCE AVE WOODLAND HILLS, CA 91367		PC	LONG BEACH LEAPS & BOUNDS EARLY INTERVENTION PROGRAM	40,000	
OPERATION JUMP START 3515 LINDEN AVE LONG BEACH, CA 90807		PC	OJS PROGRAMS	60,000	
PARTNERS OF PARKS 2760 N STUDEBAKER RD LONG BEACH, CA 90815		PC	YOUTH SCHOLARSHIPS FOR VIRTUAL AND IN-PERSON CLASSES AND CAMPS	16,000	
PATHWAYS VOLUNTEER HOSPICE 4645 WOODRUFF AVENUE LAKEWOOD, CA 90713		PC	CHANGES, CHILDRENS GRIEF COUNSELING AND EDUCATION PROGRAM	30,000	
PLANNED PARENTHOOD LOS ANGELES 400 W 30TH ST LOS ANGELES, CA 900073320		PC	REPRODUCTIVE AND SEXUAL HEALTH CARE AT PLANNED PARENTHOOD LOS ANGELES (PPLA) LONG BEACH	25,000	
POOLS OF HOPE 6801 LONG BEACH BLVD LONG BEACH, CA 90805		PC	YOUTH WELLNESS PROGRAM	30,000	
PORT CHESTER CARVER CENTER INC 400 WESTCHESTER AVE PO BOX 429 PORT CHESTER, NY 10573		PC	PLANNING AND BUILDING FOR CARVER'S FUTURE	60,000	
PRECIOUS LAMB PRESCHOOL 2005 PALO VERDE AVE PMB 301 LONG BEACH, CA 90815		PC	FAMILY OUTREACH & SOCIAL WORK PROGRAM DEVELOPMENT	45,000	
RANCHO LOS CERRITOS FOUNDATION 4600 VIRGINIA RD LONG BEACH, CA 90807		PC	ADOBE DAYS REVISITED: A CULTURALLY RESPONSIVE AND STEAM RELAUNCH	50,000	
RED HOOK INITIATIVE 767 HICKS STREET BROOKLYN, NY 11231		PC	RED HOOK FARMS	25,000	
RISEING TIDE AT MARGUERITE KIEFER EDUCATION CENTER INC 607 E THIRD ST LONG BEACH, CA 90802		PC	PROGRAM SUPPORT	25,000	
RONALD MCDONALD HOUSE CHARITIES OF SOUTHERN CALIFORNIA 1250 LYMAN PLACE LOS ANGELES, CA 90029		PC	CAMP RONALD MCDONALD FOR GOOD TIMES "CAMP AT HOME" PROGRAMMING	20,000	
SOUND WATERS INC 1281 COVE RD STAMFORD, CT 06902		PC	SOUNDWATERS RESEARCH INTENSIVE	60,000	
ST ANTHONY HIGH SCHOOL 620 OLIVE AVENUE LONG BEACH, CA 90802		PC	ST. ANTHONY HIGH SCHOOL SCHOLARSHIP PROGRAM	48,000	
ST BARNABAS SCHOOL 3980 MARRON AVE LONG BEACH, CA 90807		PC	TUITION ASSISTANCE	65,000	
SU CASA - ENDING DOMESTIC VIOLENCE 3750 E ANAHEIM STREET SUITE 100 LONG BEACH, CA 90804		PC	LEADERSHIP DEVELOPMENT AND INFRASTRUCTURE DEVELOPMENT	45,000	
SUCCESS IN CHALLENGES 4508 ATLANTIC AVENUE UNIT 782 LONG BEACH, CA 90807		PC	SUCCESS IN CHALLENGES CAPACITY BUILDING FOR THE FUTURE	35,000	
TEENS RUN DC PO BOX 15651 WASHINGTON, DC 20003		PC	TEENS RUN DC MENTORING, SEL, AND DISTANCE RUNNING PROGRAM (2022-23)	40,000	
THE BEACON HOUSE OF SAN PEDRO 1003 SOUTH BEACON STREET SAN PEDRO, CA 90731		PC	LEARNING MANAGEMENT AND CAREER EXPLORATION SYSTEM	25,000	
THE CHILDREN'S CLINIC SERVING CHILDREN AND THEIR FAMILIES 701 EAST 28TH STREET STE 200 LONG BEACH, CA 90806		PC	TCC FAMILY HEALTH AND WELLNESS CAPITAL PROJECT	225,000	
THE CHILDREN'S CLINIC SERVING CHILDREN AND THEIR FAMILIES 701 EAST 28TH STREET STE 200 LONG BEACH, CA 90806		PC	TCC FAMILY HEALTH AND WELLNESS DEVELOPMENTAL AND BEHAVIORAL HEALTH CARE FOR CHILDREN	100,000	
THE GUIDANCE CENTER 1301 PINE AVE LONG BEACH, CA 90813		PC	SUICIDE ASSESSMENT AND TREATMENT TRAINING	50,000	
THE JEWEL BOX CHILDREN'S THEATER COMPANY 3371 CERRITOS AVE SIGNAL HILL, CA 90755		PC	ARTS EDUCATION OUTREACH PROGRAM	15,000	
THE LGBTQ CENTER LONG BEACH 2017 E 4TH STREET LONG BEACH, CA 90814		PC	MENTORING YOUTH THROUGH EMPOWERMENT (MYTE)	43,000	
THE SALVATION ARMY LONG BEACH CORPS AND COMMUNITY CENTER 3060 LONG BEACH BLVD LONG BEACH, CA 90807		PC	THE SALVATION ARMY LONG BEACH RED SHIELD YOUTH CLUB	25,000	
TICHENOR CLINIC FOR CHILDREN 1660 TERMINO AVE LONG BEACH, CA 90804		PC	SPEECH THERAPY PROGRAM	30,000	
UN MUNDO DE AMIGOS PRESCHOOL 1480 LONG BEACH BLVD LONG BEACH, CA 90813		PC	INVESTING IN PRESCHOOL TEACHERS	45,000	
UNITED CAMBODIAN COMMUNITY 2201 E ANAHEIM STREET SUITE 200 LONG BEACH, CA 90804		PC	CAMBODIAN ALLIANCE FOR LEADING YOUTH	30,000	
WOMENSHelter OF LONG BEACH PO BOX 17098 LONG BEACH, CA 90807		PC	CHILDREN & YOUTH SERVICES	40,000	
YMCA OF GREATER LONG BEACH 3605 LONG BEACH BLVD SUITE 210 LONG BEACH, CA 90807		PC	YMCA YOUTH INSTITUTE	35,000	
YOUNG HORIZONS 501 ATLANTIC AVE LONG BEACH, CA 90802		PC	EARLY CHILDHOOD EDUCATION PROGRAM	50,000	
YWCA GREENWICH 259 EAST PUTNAM AVENUE GREENWICH, CT 06830		PC	CHILD COUNSELING FOR VICTIMS OF DOMESTIC VIOLENCE	30,000	
THE NONPROFIT PARTNERSHIP (FISCAL SPONSOR) 4900 E CONANT BLDG 0-2 SUITE 225 LONG BEACH, CA 90808		PC	LONG BEACH GIVES	35,000	
THE NONPROFIT PARTNERSHIP (FISCAL SPONSOR) 4900 E CONANT BLDG 0-2 SUITE 225 LONG BEACH, CA 90808		PC	CAPACITY BUILDING FOR NONPROFITS	50,000	
THE NONPROFIT PARTNERSHIP (FISCAL SPONSOR) 4900 E CONANT BLDG 0-2 SUITE 225 LONG BEACH, CA 90808		PC	NONPROFIT PROFESSIONAL SERVICES FUND	30,000	
18 REASONS 3674 18TH ST SAN FRANCISCO, CA 94110		PC	GENERAL OPERATING	1,000	
ANACOSTIA RIVERKEEPER 515 M STREET SE SUITE 218 WASHINGTON, DC 20003		PC	OPERATING SUPPORT	1,000	
APPALACHIAN MOUNTAIN CLUB 10 CITY SQUARE BOSTON, MA 02129		PC	NY/NJ YOUTH OPPORTUNITIES PROGRAM	1,000	
ARIZONA ART ALLIANCE 10810 N TATUM BLVD SUITE 102-264 PHOENIX, AZ 85028		PC	OUTREACH PROGRAMS	5,000	
BARD COLLEGE BPI - P O BOX 5000 ANNANDALEONHUDSON, NY 12504		PC	BPI'S BROOKLYN MICROCOLLEGE	2,000	
BEST BUDDIES NEW YORK 120 WEST 45TH STREET 3800 NEW YORK, NY 10036		PC	MENTORING CHILDREN WITH DISABILITIES	1,000	
BK ROT 86 WYCKOFF AVE P O BOX 370538 BROOKLYN, NY 112379587		PC	OPERATING SUPPORT	1,500	
BLACK FARMER FUND INC 228 PARK AVE S NEW YORK CITY, NY 100031502		PC	BOARDS SUPPORT	1,000	
BOY SCOUTS OF AMERICA LONG BEACH AREA COUNCIL 401 E 37TH STREET LONG BEACH, CA 90807		PC	OPERATING SUPPORT	2,500	
BOY SCOUTS OF AMERICA LONG BEACH AREA COUNCIL 401 E 37TH STREET LONG BEACH, CA 90807		PC	SELF STORAGE	3,700	
BOYS & GIRLS CLUBS OF LONG BEACH 3635 LONG BEACH BOULEVARD LONG BEACH, CA 90807		PC	OPERATING SUPPORT	5,000	
BOYS & GIRLS CLUBS OF LONG BEACH 3635 LONG BEACH BOULEVARD LONG BEACH, CA 90807		PC	YOUTH SKATEBOARD PROGRAM	10,000	
BREAST CANCER ALLIANCE INC 48 MAPLE AVENUE GREENWICH, CT 06830		PC	OPERATING SUPPORT	5,000	
CALCANEARTH ISLAND INSTITUTE P O BOX 1366 SEBASTOPOL, CA 95473		PC	OPERATING SUPPORT	1,000	
CAPITAL AREA FOOD BANK 4900 PUERTO RICO AVENUE NE WASHINGTON, DC 20017		PC	OPERATING SUPPORT	500	
PO BOX 3740 CHICO, CA 959273740		PC	OPERATING SUPPORT	250	
CITY BLOSSOMS 516 KENNEDY ST NW WASHINGTON, DC 20011		PC	OPERATING SUPPORT	1,000	
CITY KIDS WILDERNESS PROJECT 2631 15TH STREET NW WASHINGTON, DC 20009		PC	OPERATING SUPPORT	500	
CITY SURF PROJECT 400 TREAT AVENUE UNIT G SAN FRANCISCO, CA 94110		PC	OPERATING SUPPORT	3,000	
CIVIL EATS 502 E COTATI AVE NO 7014 COTATI, CA 94931		PC	OPERATING SUPPORT	1,000	
COMMON GOOD CITY FARM PO BOX 26030 WASHINGTON, DC 20001		PC	OPERATING SUPPORT	500	
CRISPUS ATTUCKS DEVELOPMENT CORPORATION 23 U ST NW WASHINGTON, DC 20001		PC	OPERATING SUPPORT	1,000	
CSULB 49ER FOUNDATION 6300 E UNIVERSITY DRIVE SUITE 324 LONG BEACH, CA 90815		PC	2022 BLACK ALUMNI SCHOLARSHIP GALA	4,600	
DISCALCED INC DBA MARK MORRIS DANCE CENTER 3 LAFAYETTE AVE BROOKLYN, NY 112171415		PC	SCHOLARSHIPS FOR CHILDREN AND YOUTH AT MDC SCHOOL	1,000	
EB RESEARCH PARTNERSHIP INC 244 MADISON AVENUE STE 104 NEW YORK, NY 10016		PC	OPERATING SUPPORT	1,000	
EVERYTOWN FOR GUN SAFETY SUPPORT FUND PO BOX 4184 NEW YORK, NY 10163		PC	OPERATING SUPPORT	1,000	
FAMILY CENTERS INC 40 ARCH STREET GREENWICH, CT 06830		PC	OPERATING SUPPORT	4,000	
FARM SCHOOL NYC 505 8TH AVE NEW YORK, NY 10018		PC	OPERATING SUPPORT	500	
GREATER FARALLONES ASSOCIATION THE PRESIDIO P O BOX 29386 SAN FRANCISCO, CA 94129		PC	OPERATING SUPPORT	1,000	
GREENWICH POINT CONSERVANCY PO BOX 377 OLD GREENWICH, CT 06870		PC	BUILDING RESTORATION	3,000	
GREEN-WOOD HISTORIC FUND INC 500 25TH STREET BROOKLYN, NY 11232		PC	HORTICULTURE AND NATURE PROGRAMS	1,000	
IMPACT JUSTICE 2930 LAKESHORE AVENUE STE 300 OAKLAND, CA 94610		PC	CRIMINAL JUSTICE REFORM	1,000	
JOSEPHINE HERRICK PROJECT 64 FULTON STREET STE 905 NEW YORK, NY 10038		PC	OPERATING SUPPORT	5,000	
LONG BEACH PUBLIC LIBRARY FOUNDATION 200 W BROADWAY LONG BEACH, CA 90802		PC	OPERATING SUPPORT	5,000	
MAKE-A-WISH FOUNDATION OF CT INC 126 MONROE TURNPIKE TRUMBULL, CT 06611		PC	TO CREATE LIFE CHANGING WISHES FOR CHILDREN WITH CRITICAL ILLNESS	3,000	
MARINE ANIMAL RESCUE SPECIALISTS INC 214 MAIN ST 392 EL SEGUNDO, CA 902453803		PC	OPERATING SUPPORT	2,000	
MEALS ON WHEELS INC OF GREENWICH CONNECTICUT 89 MAPLE AVENUE GREENWICH, CT 06830		PC	OPERATING SUPPORT	1,000	
MIGRANT JUSTICE 179 S WINOSKI AVENUE UNIT 202 BURLINGTON, VT 05401		PC	OPERATING SUPPORT	1,000	
MUTTVILLE 255 ALABAMA STREET SAN FRANCISCO, CA 94103		PC	OPERATING SUPPORT	250	
NAGOURNEY INSTITUTE 750 E 29TH STREET LONG BEACH, CA 90806		PC	OPERATING SUPPORT	3,000	
NAGOURNEY INSTITUTE 750 E 29TH STREET LONG BEACH, CA 90806		PC	OPERATING SUPPORT	3,000	
NEW YORK PUBLIC RADIO 160 VARICK STREET NEW YORK, NY 10013		PC	TO SUPPORT WNYC	500	
ORTHOPEAEDIC INSTITUTE FOR CHILDREN FOUNDATION 403 W ADAMS BLVD LOS ANGELES, CA 900082664		PC	OPERATING SUPPORT	4,000	
PASCI SYNDROME RESEARCH FOUNDATION 36 WEST WAY OLD GREENWICH, CT 06870		PC	OPERATING SUPPORT	2,000	
PRAIRIE VISTA MIDDLE SCHOOL 13600 PRAIRIE AVENUE HAWTHORNE, CA 90250		PC	MUSIC PROGRAM SUPPORT	2,500	
PROSPECT PARK ALLIANCE 95 PROSPECT PARK WEST BROOKLYN, NY 11215		PC	LANDSCAPE RESTORATION PROJECTS	500	
RSJM LIFE CENTER 32-34 BEEKMAN AVENUE SLEEPY HOLLOW, NY 10591		PC	BIKE TARRYTOWN	1,000	
RYSE CENTER 3939 BISSELL AVENUE RICHMOND, CA 94805		PC	YOUTH JUSTICE PROGRAM	1,000	
SANTA CATALINA SCHOOL 1580 MARK THOMAS DRIVE MONTEREY, CA 93940		PC	UPPER HIGH SCHOOL EDUCATION PROGRAMS	3,000	
SAVE THE SOUND 900 CHAPEL STREET NEW HAVEN, CT 06510		PC	OPERATING SUPPORT	2,000	
SOUND WATERS INC 1281 COVE RD STAMFORD, CT 06902		PC	OPERATING SUPPORT	2,000	
SOUND WATERS INC 1281 COVE RD STAMFORD, CT 06902		PC	OPERATING SUPPORT	3,000	
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVENUE MONTGOMERY, AL 36104		PC	OPERATING SUPPORT	1,000	
SUSTAINABLE CONSERVATION 98 BATTERY STREET 302 SAN FRANCISCO, CA 94111		PC	OPERATING SUPPORT	1,000	
TEE IT UP FOR THE TROOPS - HUNTINGTON BEACH P O BOX 3358 HUNTINGTON BEACH, CA					

Part XV-A

(e)
Related or exempt
function income
(See
instructions.)

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

Form **990-PF** (2022)

Part XVI

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

(1) Cash.

(2) Other assets.

b Other transactions:

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization

(3) Rental of facilities, equipment, or other assets. . . .

(4) Reimbursement arrangements.

(5) Loans or loan guarantees. . . .

(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

[illegible]

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

b If "Yes," complete the following schedule.

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

	2024-10-10	
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below?
See instructions. ☐ Yes ☐ No

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	ELEANOR A LIVINGSTON CPA		2024-10-10		P00226461
	Firm's name ☐ WINDES INC				Firm's EIN ☐ 95-300117
	Firm's address ☐ 2050 MAIN ST STE 1300 IRVINE, CA 92614				Phone no. (949) 852-9433

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B (Form 990) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.	OMB No. 1545-0047
		2022
Name of the organization THE RUDOLPH J & DAPHNE A MUNZER FOUNDATION		Employer identification number 33-0686779

Organization type (check one):

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization THE RUDOLPH J & DAPHNE A MUNZER FOUNDATION	Employer identification number 33-0686779
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Part I

Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	DAPHNE ANN MUNZER ADMINISTRATIVE TRUST 3450 EAST SPRING ST 218 LONG BEACH, CA 90806	\$ 505,000	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization THE RUDOLPH J & DAPHNE A MUNZER FOUNDATION	Employer identification number 33-0686779
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Part II

Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	

Name of organization THE RUDOLPH J & DAPHNE A MUNZER FOUNDATION	Employer identification number 33-0686779
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

Additional Data

[Return to Form](#)

Software ID:

Software Version:

TY 2022 IRS 990 e-File Render

Name: THE RUDOLPH J & DAPHNE A MUNZER
FOUNDATION

EIN: 33-0686779

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	35,950	16,389	0	19,561

TY 2022 IRS 990 e-File Render

Name: THE RUDOLPH J & DAPHNE A MUNZER
FOUNDATION

EIN: 33-0686779

Identifier	Return Reference	Explanation
REASON FOR AMENDED RETURN	FORM 990PF PAGE 1 ITEM G	THIS AMENDED RETURN IS BEING FILED TO INCLUDE FORM 926, RETURN BY A U.S. TRANSFEROR OF PROPERTY TO A FOREIGN CORPORATION.
STATEMENT REQUIRED BY IRC REG. SEC. 1.6038B-1(F)(3)(II)	FORM 926	REASONABLE CAUSE EXPLANATION FOR FORM 926 LATE FILING:FORM 926 WAS NOT INCLUDED IN THE ORIGINAL FILING BECAUSE THE TAXPAYER WAS UNAWARE THAT AN INVESTMENT IN A FOREIGN CORPORATION REPORTABLE ON FORM 926, HAD BEEN MADE. AS SOON AS THE TAXPAYER BECAME AWARE OF THE REPORTING OBLIGATION, THE TAXPAYER ACTED TO FILE AMENDED RETURNS TO REPORT THE TRANSACTIONS FOR ALL YEARS IN WHICH A REPORTABLE INVESTMENT WAS MADE.

TY 2022 IRS 990 e-File Render

Name: THE RUDOLPH J & DAPHNE A MUNZER
FOUNDATION

EIN: 33-0686779

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
SUSTAINABLE MULTI-ASSET GROWTH FUND	FMV	73,118,243	73,118,243
SUSTAINABLE BOND FUND	FMV	12,105,701	12,105,701
PRIVATE MARKETS FUND 2019 LP	FMV	2,774,540	2,774,540

TY 2022 IRS 990 e-File Render

Name: THE RUDOLPH J & DAPHNE A MUNZER
FOUNDATION

EIN: 33-0686779

Description	Amount
UNREALIZED LOSS	16,219,226

TY 2022 IRS 990 e-File Render

Name: THE RUDOLPH J & DAPHNE A MUNZER
FOUNDATION
EIN: 33-0686779

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE SUPPLIES	18,203	0	0	14,569
BOARD MEETING EXPENSES	3,091	0	0	2,989
DUES & SUBSCRIPTIONS	12,033	0	0	11,959
INSURANCE	5,527	0	0	2,764
TELEPHONE	2,508	0	0	2,383
MISCELLANEOUS	12,536	0	0	12,534
WEBSITE	4,751	0	0	2,585
SOFTWARE	480	0	0	261
CA ATTORNEY GENERAL FILING FEE	200	0	0	200

TY 2022 IRS 990 e-File Render

Name: THE RUDOLPH J & DAPHNE A MUNZER
FOUNDATION

EIN: 33-0686779

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME FROM K-1S	0	606,039	

TY 2022 IRS 990 e-File Render

Name: THE RUDOLPH J & DAPHNE A MUNZER
FOUNDATION

EIN: 33-0686779

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	501,733	501,733	0	0
PROFESSIONAL CONSULTANT FEES	43,500	0	0	23,669

TY 2022 IRS 990 e-File Render

Name: THE RUDOLPH J & DAPHNE A MUNZER
FOUNDATION

EIN: 33-0686779

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	203,892	0	0	0
FOREIGN TAXES	0	140,507	0	0