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

, and ending

2013

Department of the Treasury Internal Revenue Service

For calendar year 2013 or tax year beginning

| Do not enter Social Security numbers on this form as it may be made public | Information about Form 990-PF and its separate instructions is atwww.urs gov/form990pf

	Nar	me of foundation					A Employer identification	n number		
	_	ACTEL THE WINE TO	, , , , , , , , , , , , , , , , , , ,				94-6080099	•		
		AQUELIN HUME FO				2(-:t				
		00 MONTGOMERY S		·			B Telephone number 415-705-5115			
		or town, state or province, country	· · · · · · · · · · · · · · · · · · ·		l.					
		AN FRANCISCO, C.					C if exemption application is p	bending, check here		
	G C	Check all that apply 🔲 Ini	itial return	Initial return of a fo	rmer public ch	anty	D 1. Foreign organization	s, check here		
		Fin	nal return	Amended return			2 Foreign omenizations m	ceture the 85% test		
			Idress change	Name change			<ol><li>Foreign organizations me check here and attach or</li></ol>	omputation		
	H_C			empt private foundation			E If private foundation sta			
		Section 4947(a)(1) nonexempt of	T	Other taxable private founda			under section 507(b)(1	)(A), check here		
		air market value of all assets at end	· · —	-	Accru	31	F If the foundation is in a	_ L I		
		rom Part II, col. (c), line 16)		her (specify)			under section 507(b)(1	)(B), check here		
				mn (d) must be on cash b				(4) 0		
	Pa	Analysis of Revenue and E. (The total of amounts in columns	(b), (c), and (d) may not [	(a) Revenue and expenses per books	(b) Net inve		(c) Adjusted net income	(d) Disbursements for chantable purposes		
		necessarily equal the amounts in		expenses per books			N/A	(cash basis only)		
		1 Contributions, gifts, grants, e 2 Check ► X if the foundation is n					LY/ FA			
2014		Interest on savings and temporary		58.		58.		STATEMENT 1		
77		3 cash investments	eacuritiae .	538,003.	538	,003.		STATEMENT 2		
$\mathbf{r}$		5a Gross rents	secunities	330,0001		7000		7		
$\sim$		D Net rental income or (loss)	•							
L AUG	_	62 Not and a face to a face	ets not on line 10	848,733.	прин	······································	· · · · · · · · · · · · · · · · · · ·			
	uge.	b Gross sales price for all assets on line 6a	,833,525.							
	Revenue	7 Capital gain net income (from Part	IV, line 2)		848	,733.				
Щ	ď	8 Net short-term capital gain								
4		9 Income modifications								
A		10a Gross sales less returns and allowances								
SCANNED		Less Cost of goods sold								
(J)		c Gross profit or (loss)								
		11 Other income	En	<249.		<249.	>	STATEMENT 3		
		12 Total: Add Ines 1 (Trough)		1,386,545.	1,386	,545. 0.		103,107.		
		13 Compensation of officers, director		103,107.		0.		103,107.		
		14 Other employee salaries and 15 Pension plans employee ber	Maddet (1)	68,738.	· ·	0.		68,738.		
	S	15 Pension dians Pelabloyee ber 16a Legaliées	STMT 4	620.		0.		620.		
	ŠŲŠ	h Accounting tops ODE		9,500.	4	,750.		4,750.		
	Expenses	b Accounting fees GDE	STMT 6	43,511.		,011.	·	10,500.		
	<b>6</b>	17 Interest				*				
	rati	18 Taxes	STMT 7	60,000.		0.		0.		
	ist	19 Depreciation and depletion								
	Ē	20 Occupancy								
	Ρ	21 Travel, conferences, and mee	etings	17,523.	_	0.		17,523.		
	pue	22 Printing and publications	-							
	Operating and Administrative	23 Other expenses .	STMT 8	29,094.	13	,613.		15,482.		
	raţį	24 Total operating and adminis	strative							
	be	expenses. Add lines 13 throi	ugh 23	332,093.	51	,374.		220,720.		
	U	25 Contributions, gifts, grants p		4,356,250.				4,356,250.		
		26 Total expenses and disburs	ements.	4 600 343	E 1	274		1 576 070		
		Add lines 24 and 25	· · ·	4,688,343.	51	,374.	<del></del>	4,576,970.		
		27 Subtract line 26 from line 12		<3,301,798.	,			į .		
		2 Excess of revenue over expenses		\3,3U1,13O•	1 225	,171.	<del></del>	\ <u></u>		
		b Net investment income (if neg c Adjusted net income (if negat	į		1,333	/ - / - •	N/A			
		- Aufroren net mennie in negat	110, EILEI -U-)	<u> </u>				***************************************		

123501 10-10-13 LHA For Paperwork Reduction Act Notice, see instructions. Form 990-PF (2013)



Page 2

Form **990-PF** (2013)

Part	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	year
rart	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
1	Cash - non-interest-bearing	2,132,069.	1,218,817.	1,218,817.
2	Savings and temporary cash investments			
3	Accounts receivable ►			
	Less allowance for doubtful accounts ▶	47,750.		
4	Pledges receivable ►			
	Less allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other			
	disqualified persons			
7	Other notes and loans receivable			
	Less allowance for doubtful accounts ▶			
ध इ	Inventories for sale or use			
Assets	Prepaid expenses and deferred charges			
₹  10a	Investments - U S and state government obligations			
b	Investments - corporate stock STMT 9	18,888,255.	20,897,140.	18,230,419.
C	Investments - corporate bonds			· - r · · · · · · · · · · · · · · · · ·
11	Investments - land, buildings, and equipment basis  Less: accumulated depreciation  5,184.			
	Less: accumulated depreciation 5,184.			
12	Investments - mortgage loans			
13	Investments - other _			
14	Land, buildings, and equipment basis ▶			
	Less accumulated depreciation			
15	Other assets (describe ► STATEMENT 10)	39,705.	39,456.	39,456.
16	Total assets (to be completed by all filers - see the			
	instructions: Also, see page 1, item 1)	21,107,779.	22,155,413.	19,488,692.
17	Accounts payable and accrued expenses			
18	Grants payable			
ဖ္မ 19	Deferred revenue			
<b>20</b>	Loans from officers, directors, trustees, and other disqualified persons			
19 20 21 21 22 22 22 22 22 22 22 22 22 22 22	Mortgages and other notes payable	-	4 9 4 9 4 9 9	
22	Other liabilities (describe > AGENCY PAYABLE FTE)	0.	4,349,432.	
23	Total liabilities (add lines 17 through 22)	0.	4,349,432.	
	Foundations that follow SFAS 117, check here			
σ l	and complete lines 24 through 26 and lines 30 and 31.			
S 24	Unrestricted			•
호 25	Temporarily restricted			
26 di	Permanently restricted			
<u>.</u> \$	Foundations that do not follow SFAS 117, check here			
<u></u>	and complete lines 27 through 31.	100	100.	
<u>ي</u> 27	Capital stock, trust principal, or current funds	100.	0.	
Net Assets or Fund Balano 25 26 22 28 30 30	Paid-in or capital surplus, or land, bldg., and equipment fund			
Ž   29	Retained earnings, accumulated income, endowment, or other funds	21,107,679.	17,805,881. 17,805,981.	
ဆို  30	Total net assets or fund balances	21,107,779.	17,005,901.	
		21 107 770	22 155 412	
31	Total liabilities and net assets/fund balances	21,107,779.	22,155,413.	
Part	Analysis of Changes in Net Assets or Fund Ba	alances		
1 Total	I not second or fund halanges at healaning of year - Part II, column (a), ting			
	I net assets or fund balances at beginning of year - Part II, column (a), line : st agree with end-of-year figure reported on prior year's return)	<b>,</b>		21,107,779.
-	r amount from Part I, line 27a		2	<3,301,798.
	r increases not included in line 2 (itemize)			0.
	lines 1, 2, and 3		4	17,805,981.
	eases not included in line 2 (itemize)	• • •	. 5	0.
	I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b), line 30	6	17,805,981.

6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

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₽.	til ( t ) Oapital Gallis	alla E03363 for Tax Off in	14621111611	LINCONIE					
	(a) List and described 2-story brick wa	ribe the kind(s) of property sold (e.g.	, real estate, s MLC Co )		P-	ow acquired Purchase Donation	(c) Date (mo , d	acquired lay, yr )	(d) Date sold (mo , day, yr )
12	CHARLES SCHWAB				0-	P	VARI	OUS	VARIOUS
_	CHARLES SCHWAB	- WURTS PORTFOL		·		P	VARI		VARIOUS
		WORLD TORITOR	10		<del> </del> -		VANCE	000	VARCIOOD
<u>c</u>					<del>                                     </del>				<del>                                     </del>
_ <u>u</u> e					<del>                                     </del>				
		(f) Depreciation allowed	(a) Co	st or other basis			(b) G	aın or (loss	<u> </u>
	(e) Gross sales price	(or allowable)		expense of sale				s (f) minus	
_	99,944.	,		99,57	8		(-,,-		366.
_ <u>a</u> b	2 222 501			6,885,21					848,367.
_				0,005,21			<del></del>		040/3076
					-				
					-+				
<u>e</u>		a sale is column (b) and award but	ha farradabar	10/01/00	_				<del></del>
_	Complete only for assets snowin	g gain in column (h) and owned by t			-		I) Gains (C I (k), but r		
	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col (i)		0.0	Losses	(from col	(h))
		as 01 12/31/09	0.00	COI (j), ii aliy	<del></del>		-		266
_ <u>a</u>	-								366.
<u>b</u>	· · · · · · · · · · · · · · · · · · ·								848,367.
							_		
<u>d</u>				-	_				
<u>e</u>						<del>.  </del>			
2	Capital gain net income or (net cap	pital loss) { If gain, also enter If (loss), enter -0-			}	2	<del> </del>		848,733.
	Net short-term capital gain or (los If gain, also enter in Part I, line 8, o	s) as defined in sections 1222(5) an	d (6)						
	If (loss), enter -0- in Part I, line 8				<i>}</i>	3		N/A	
P	art V Qualification U	nder Section 4940(e) for	Reduced	Tax on Net	Inve	stment In	come		
(Fo	or optional use by domestic private	foundations subject to the section 4	1940(a) tax or	net investment ind	come )	)		•	
IT S	section 4940(d)(2) applies, leave th	is part blank							
Wa	is the foundation liable for the sect	ion 4942 tax on the distributable am	ount of any y	ear in the base pen	10d?				Yes X No
If "	Yes," the foundation does not quali	fy under section 4940(e) Do not co	mplete this pa	ırt					
1	Enter the appropriate amount in e	ach column for each year; see the in	structions be	fore making any en	ntries				
	(a)	(b)			(c)			Dietril	(d) oution ratio
1	Base periód years Calendar year (or tax year beginnin	ng in) Adjusted qualifying dist	tributions	Net value of nor	ncharit	able-use assets	;   (	(col (b) di	vided by col (c))
	2012	4,93	5,284.		23,	421,885	5.		.210713
	2011	5,40	4,520.		26,	426,964	1.		.204508
	2010	5,26	5,126.		29,	744,202	2.		.177014
	2009	7,10	1,219.		30,	271,352	2.		.234585
	2008	4,31	2,630.		20,	724,84	L.		.208090
						•			
2	Total of line 1, column (d)		••				2		1.034910
		i-year base period - divide the total o		or by the number of	of vear		-		··
	the foundation has been in existen		, , _ ,		. ,		3		.206982
						• ••			-
4	Enter the net value of noncharitable	le-use assets for 2013 from Part X, I	ine 5				4	1	8,607,691.
•	Enter the net value of nonchantable	10 430 4330t3 101 2010 Holli 1 41t X, 1	5				·		.,,
5	Multiply line 4 by line 3						5		3,851,457.
•	Multiply line 4 by line 3		•	• •	•	• •	"		0,002,1070
£	Enter 1% of net investment incom	in /19/, of Part L line 27h)					6		13,352.
U	Litter 1 % of flet investment incom	le (1 % 01 Fait i, ilite 270)	•				1-0-1		15/0520
7	Add lines 5 and 6						7		3,864,809.
•	AUU IIIIES 3 AIIU 0 .	••				•	· <del>  '  </del>		2,001,003.
Ω	Enter qualifying distributions from	Part VII line 4					8		4,576,970.
	Enter qualifying distributions from						٥		-, -, -, -, -, -, -, -, -, -, -, -, -, -
	If line 8 is equal to or greater than See the Part VI instructions	line 7, check the box in Part VI, line	10, and comp	nete that part using	y a 1%	tax rate			
_	521 10-10-13	<del></del>							orm <b>990-PF</b> (2013)

Earny   Excise   Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)   1	Forn	n 990-PF (2013) JAQUELIN HUME FOUNDATION 94-60	8008	99		Page 4
Date of ruling or determination latter  (a Chart Line 27b  (b Omestic Section 4947(a) requirements in Part V, check here  (b Part Line 27b  (c) Part Line 27b  (a) All other domestic foundations celler 2% of line 27b Exempt foreign organizations enter 4% of Part Line 12, col (b)  2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter 0-)  3 Add ther 1 and 2  3 Add thers 1 and 2  3 Add thers 1 and 2  5 Subtitle A (normal Line and 1947(a)(1) trusts and taxable foundations only Others enter 0-)  5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter 0-  6 Credits/Pymprists  2 2013 estimated tax payments and 2012 overpayment credited to 2013  5 Exempt foreign organizations: Tax withheld at source  6 Tax paid with application for extension of time to file (Form 8868)  6 Ecler any penalty for underpayment or stimated tax Check here [X] if Form 2220 is attached  7 Total credits and payments Add lines 6 through 6d  8 Enter any penalty for underpayment or stimated tax Check here [X] if Form 2220 is attached  1 Tax due. If the total of lines 5 and 6 is more than time 7, enter amount overpaid  10 Overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total crimes is an experiment to a line of 10 total or lines 10 total or lines 2 and 6 is more than 10 total or lines 2 and 6 is more than 10 total or lines 2 and 6 is m	_	ert VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - se	ee ins	tru	ctio	ns)
Date of ruling or determination latter  (a Chart Line 27b  (b Omestic Section 4947(a) requirements in Part V, check here  (b Part Line 27b  (c) Part Line 27b  (a) All other domestic foundations celler 2% of line 27b Exempt foreign organizations enter 4% of Part Line 12, col (b)  2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter 0-)  3 Add ther 1 and 2  3 Add thers 1 and 2  3 Add thers 1 and 2  5 Subtitle A (normal Line and 1947(a)(1) trusts and taxable foundations only Others enter 0-)  5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter 0-  6 Credits/Pymprists  2 2013 estimated tax payments and 2012 overpayment credited to 2013  5 Exempt foreign organizations: Tax withheld at source  6 Tax paid with application for extension of time to file (Form 8868)  6 Ecler any penalty for underpayment or stimated tax Check here [X] if Form 2220 is attached  7 Total credits and payments Add lines 6 through 6d  8 Enter any penalty for underpayment or stimated tax Check here [X] if Form 2220 is attached  1 Tax due. If the total of lines 5 and 6 is more than time 7, enter amount overpaid  10 Overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total of lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total or lines 5 and 6, enter the amount overpaid  10 Overpayment. If line 7 is more than the total crimes is an experiment to a line of 10 total or lines 10 total or lines 2 and 6 is more than 10 total or lines 2 and 6 is more than 10 total or lines 2 and 6 is m	1a	Exempt operating foundations described in section 4940(d)(2), check here   and enter "N/A" on line 1				
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► X and either 4% of Part I, line 12; col. (b)  1 2 Fax Under section 511 (domestic section 4947(a)(1) trusts and taxable foundations enter 4% of Part I, line 12; col. (b)  2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only (Others enter -0-)  3 Add lines 1 and 2  3 13,355.  5 Tax based on investment incense. Subtract line 4 from line 3 if zero rises, enter -0-  5 Tax based on investment incense. Subtract line 4 from line 3 if zero rises, enter -0-  5 Tax based on investment incense. Subtract line 4 from line 3 if zero rises, enter -0-  5 Tax based on investment incense. Subtract line 4 from line 3 if zero rises, enter -0-  5 Tax based on investment incense. Subtract line 4 from line 3 if zero rises, enter -0-  5 Tax based on investment forms and 2012 overpayment credided to 2013  6 Ead and 2 2013 estimated tax payments and 2012 overpayment credided to 2013  6 Eacksup withholding erroenously withheld  7 Total credits and payments And lines 5 and through 6d  8 Eacksup withholding erroenously withheld  7 Total credits and payments. And lines 5 and 8 is more than line 7, enter amount overpaid  9 Tax dise. If the total of lines 5 and 8 is more than line 7, enter amount overpaid  10 Overpayment. If line 7 is more than line 10 to be Credited to 2014 estimated tax ► 200 overpayment. If line 7 is more than 10 to be Credited to 2014 estimated tax ► 200 overpayment. If line 7 is more than 10 to be Credited to 2014 estimated tax ► 200 overpayment. If line 7 is more than 10 to be Credited to 2014 estimated tax ► 200 overpayment overpaid  10 Line foundation than 5 than 500 duming the year (either directly or indirectly) for political expenditure for the certification of the activities.  1a Line foundation in the section 500 duming the year (either directly or indirectly) for political expenditure tax imposed on foundation many political examples in the provincial provincial proposes (see instruction						
c All other domestic foundations enter 2% of time 27b. Exempt foreign organizations enter 4% of Parl I, line 12, col. (b)  2 0.  3 3 13,352.  4 5. Dottlet A (monne) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)  5 17a based on investment licendens. Subtract line 4 from line 3 if zero or less, enter -0-  5 17a based on investment licendens. Subtract line 4 from line 3 if zero or less, enter -0-  5 17a based on investment licendens. Subtract line 4 from line 3 if zero or less, enter -0-  5 17a based on investment licendens. Subtract line 4 from line 3 if zero or less, enter -0-  5 17a based on investment licendens. Subtract line 4 from line 3 if zero or less, enter -0-  6 17a based on investment licendens. Subtract line 4 from line 3 if zero or less, enter -0-  6 17a based on investment licendens of time to file (Form 8868)  6 17a based on the subtract line 4 from line 3 if zero or less, enter -0-  6 18a based on the subtract line 4 from line 3 if zero or less, enter -0-  6 18a based on the subtract line 4 from line 3 if zero or less, enter -0-  6 18a based on the subtract line 4 from line 3 if zero or less, enter -0-  6 18a based on the subtract line 4 from line 3 if zero or less, enter -0-  6 18a based on the subtract line 4 from line 3 if zero or less, enter -0-  7 2 43,737.  8 based on the subtract line 4 from line 3 if zero or less, enter -0-  8 based on the subtract line 4 from line 6 its line 6 from 8868)  6 17a based on the subtract line 6 from 18a based on the subtract line 6 fr	b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🗶 and enter 1%		1	3,3	<u>52.</u>
2 Tax under section S11 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment or consistent line 4 from line 3 if zero or less, enter -0- 6 Total credits and payments And 2012 overpayment credited to 2013 6 Exempt to reproduce -1- 6 Because of the substance of the subs		1 1				
3 Add lines 1 and 2  Subtitle A (necome) bits (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)  Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-  5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-  5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-  6 Credita?Payments  a 2013 settmented tax payments and 2012 overpayment credited to 2013  6 Exempt foreign organizations - tax withheld at source  6 Tax paid with application for activation of time to file (Form 8868)  6 Exempt foreign organizations - tax withheld at source  6 Tax paid with application for activation of time to file (Form 8868)  6 Exempt foreign organizations - tax withheld at source  6 Tax paid with application for activation organization and the second organization o	C	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
Subbitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-  5 Credity-Pyments  a 2013 estimated tax payments and 2012 overpayment credited to 2013  6 Exempt foreign organizations - tax withheld at source  c Tax paid with application for extension of time to file (Form 8868)  6 Exempt foreign organizations - tax withheld at source  c Tax paid with application for extension of time to file (Form 8868)  6 Exempt foreign organizations - tax withheld at source  c Tax paid with application for extension of time to file (Form 8868)  6 Exempt foreign organizations - tax withheld at source  c Tax paid with application for extension of time to file (Form 8868)  6 Exempt foreign organizations - tax withheld at source  c Tax paid with application for extension of time to file (Form 8868)  6 Exempt foreign organizations - tax withheld at source  c Tax paid with application for extension of time to file (Form 8868)  6 Exempt foreign organizations - tax withheld at source  6 Tax due. If the total of lines as of 8 is more than inter ? exters remaint owed  7	2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)				
5 Tab based on investment income. Subtract line 4 from line 3 if zero or less, enter-0- 6 Credis/Payments a 2013 estimated tax payments and 2012 overpayment credited to 2013 b Exempt foreign organizations - Eax withheld at source 6 Tax paid with application for extension of time to file (Form 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here [X] if Form 2220 is attached 9 Tax die. If the total of lines 5 and 8 is more than line 7, enter amount ower 10 Overpayment, filine 7's more than the total of lines 5 and 8 is more than line 7, enter amount ower 10 Overpayment, filine 7's more than the total of lines 5 and 8 is more than amount of line 10 to be Credited to 2014 estimated tax ≥ 30 , 385 . Retunded ≥ 11 0 30 , 385. 11 Enter the amount of line 10 to be Credited to 2014 estimated tax ≥ 30 , 385 . Retunded ≥ 11 0 30 , 385. 11 Enter the amount of line 10 to be Credited to 2014 estimated tax ≥ 30 , 385 . Retunded ≥ 11 0 .  12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any optical campagn? 13 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any optical campagn? 14 If the answer is "Yes" to 1, ao" 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation on connection with the activities. 15 Did the foundation ille Form 1120-PDL for this year? 2 Enter the reimbursement (if any) paid by the foundation during the year for political expenditures tax imposed on foundation managers ≥ \$0. 2 Estate foundation made any changes, not previously reported to the IRS; in the government of the activities. 2 Diff "Yes," attach a detailed description of the activities. 3 Diff "Yes," attach in the statement required by General Instruction T. 4 A tax the requirements o	3	Add lines 1 and 2		1:	3,3	<u>52.</u>
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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  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  5 If "Yes," has it filed a tax return on Form 990-T for this year?  6 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  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?  7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV  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  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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	2		-  -4	2		
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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	•	big the foundation have at least \$5,000 in assets at any time during the year. If Tes, Complete Fact II, Con. (6), and Fact XV	<del></del>	-		
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year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	q			1		
,	•		-   (	9	[	X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	1	0		X

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,

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

Form 4720, to determine if the foundation had excess business holdings in 2013.)

had not been removed from jeopardy before the first day of the tax year beginning in 2013?

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . .

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X

3b

N/A

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Part VII-B Statements Regarding Activities for Which I	Form 4720 May Be I	Required (continu	ued)		
5a During the year did the foundation pay or incur any amount to					
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?	Y6	es X No		
(2) Influence the outcome of any specific public election (see section 4955), o	r to carry on, directly or indir	ectly,			
any voter registration drive?		Y£	es X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Y6	es X No		
(4) Provide a grant to an organization other than a charitable, etc., organizatio	n described in section				
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	es X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or t				
the prevention of cruelty to children or animals?		Ye	es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	der the exceptions described	ın Regulatıons			
section 53 4945 or in a current notice regarding disaster assistance (see instru	ctions)?		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h	ere		▶∟」│		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption for					
expenditure responsibility for the grant?	Ņ	I/A Ye	es 🔛 No 📗		
If "Yes," attach the statement required by Regulations section 53.494	5-5( <i>d</i> ).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on				
a personal benefit contract?		Ye	es 🗓 No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?			6b	<u> </u>
If "Yes" to 6b, file Form 8870.					
7a At any time during the tax year, was the foundation a party to a prohibited tax s	helter transaction?	Ye	es 🗶 No 📙		
b If "Yes," did the foundation receive any proceeds or have any net income attribu	itable to the transaction?		N/A	7b	
Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors	ees, Foundation Ma	nagers, Highly	1		
1 List all officers, directors, trustees, foundation managers and their	compensation.				
	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) E	xpense int, other
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	allo	wances
WILLIAM J. HUME	PRESIDENT & T	RUSTEE			
600 MONTGOMERY ST., STE 2800					
SAN FRANCISCO, CA 94111	1.00	0.	0.		0.
	VICE PRESIDEN	T & TRUST	EE		
600 MONTGOMERY ST., STE 2800			_		_
SAN FRANCISCO, CA 94111	1.00	0.	0.		0.
	TREASURER & I	RUSTEE			
600 MONTGOMERY ST., STE 2800		_			_
SAN FRANCISCO, CA 94111	1.00	0.	0.		0.
	SECRETARY				
600 MONTGOMERY ST., STE 2800					_
SAN FRANCISCO, CA 94111	40.00	103,107.	68,738.		0.
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) Contributions to	(-) [	vnonco
(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	accou	xpense int, other wances
NONE					
		ļ			
	-				
		<u> </u>			
	1				
		<u></u>			0
Total number of other employees paid over \$50,000		··	<u> </u>	000 0	U (0040)

Form 990-PF (2013) JAQUELIN HUME FOUNDATION	94-60800	)99 Page 7
Part VIII Information About Officers, Directors, Truste Paid Employees, and Contractors (continued)	es, Foundation Managers, Highly	
3 Five highest-paid independent contractors for professional services	i. 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 IX-A Summary of Direct Charitable Activities	<u> </u>	0
List the foundation's four largest direct charitable activities during the tax year. Including number of organizations and other beneficiaries served, conferences convened, research.  N/A  2  3	arch papers produced, etc	O.
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during	g the tax year on lines 1 and 2.	Amount
1		
2		
All other program-related investments. See instructions 3 NONE		

Total. Add lines 1 through 3

4940(e) reduction of tax in those years

F	Minimum Investment Return (All domestic foundations must complete this part. Foreign fou	ndations	, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		<del></del>
а		1a	17,930,449.
b	Average of monthly cash balances	1b	921,028.
C	Fair market value of all other assets	10	39,580.
d	Total (add lines 1a, b, and c)	1d	18,891,057.
е	Reduction claimed for blockage or other factors reported on lines 1a and		<u> </u>
	1c (attach detailed explanation) 1e 0 •		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	18,891,057.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	283,366.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	18,607,691.
6	Minimum investment return. Enter 5% of line 5	6	930,385.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here ▶ ☐ and do not complete this part )	id certain	
1	Minimum investment return from Part X, line 6	1	930,385.
2a	Tax on investment income for 2013 from Part VI, line 5 2a 13,352.		
b	Income tax for 2013. (This does not include the tax from Part VI )		
C	Add lines 2a and 2b	2c	13,352.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	917,033.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	917,033.
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 XIII, line 1	7	917,033.
P	Qualifying Distributions (see Instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	4,576,970.
b	Program-related investments - total from Part IX-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:		
а	Suitability test (prior IRS approval required)	3a	
þ	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	4,576,970.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	Income Enter 1% of Part I, line 27b	5	13,352. 4,563,618.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,563,618.
	Note. The amount on line 6 will be used in Part V. column (b), in subsequent years when calculation whether the foundation of	ualifies for	r the section

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# Part XIII Undistributed Income (see Instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI,	00.000	Todio pilot to 2012	2012	
line 7				917,033.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years				
,		0.		
3 Excess distributions carryover, if any, to 2013				
a From 2008 3, 300, 015.				
b From 2009 5', 608, 606.				
c From 2010 3,797,788.				
d From 2011 4,118,488.				
e From 2012 3,753,420.				
f <b>Total</b> of lines 3a through e	20,578,317.			
4 Qualifying distributions for 2013 from				
Part XII, line 4 $\triangleright$ \$ 4,576,970.			_	
a Applied to 2012, 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 2013 distributable amount	2 (50 027	·····		917,033.
e Remaining amount distributed out of corpus	3,659,937.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	24,238,254.			
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 2012 Subtract line				
4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2013 Subtract				
lines 4d and 5 from line 1 This amount must				
be distributed in 2014		<u> </u>	·····	0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by			`	
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008				
not applied on line 5 or line 7	3,300,015.			
9 Excess distributions carryover to 2014.	20 020 020			
Subtract lines 7 and 8 from line 6a	20,938,239.			
10 Analysis of line 9				
a Excess from 2009 5,608,606.				
b Excess from 2010 3,797,788.		,	1	
t Excess from 2011 4,118,488. d Excess from 2012 3,753,420.			1	
0.650				
e Excess from 2013 3,659,937.				- 000 DE (00.0)

	IN HUME FOUN			94-60	80099 Page 10
Part XIV Private Operating			-A, question 9)	N/A	
1 a If the foundation has received a ruling	or determination letter that	t it is a private operating			
foundation, and the ruling is effective	•	•	▶ ∟		
<b>b</b> Check box to indicate whether the fou	ndation is a private operatii	ng foundation described i		4942(J)(3) or 49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Pnor 3 years	т	 
income from Part I or the minimum	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
investment return from Part X for					
each year listed				_	
<b>b</b> 85% of line 2a					
c Qualifying distributions from Part XII,					
line 4 for each year listed					
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities					
e Qualifying distributions made directly					
for active conduct of exempt activities					
Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter			•		
2/3 of minimum investment return shown in Part X, line 6 for each year					
listed .					
c "Support" alternative test - enter:					
(1) Total support other than gross					
investment income (interest,					
dividends, rents, payments on securities loans (section					
512(a)(5)), or royalties)					
(2) Support from general public					
and 5 or more exempt organizations as provided in					
section 4942(j)(3)(B)(III)					
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income .					
Part XV Supplementary Inf			f the foundation	had \$5,000 or mo	ore in assets
at any time during	the year-see instr	uctions.)			
1 Information Regarding Foundat	ion Managers:				
a List any managers of the foundation w			ibutions received by the	foundation before the clos	se of any tax
year (but only if they have contributed	more than \$5,000) (See S	ection 507(a)(2) )			
NONE					
b List any managers of the foundation w			or an equally large portion	on of the ownership of a pa	artnership or
other entity) of which the foundation h	as a 10% or greater interes	SL.			
NONE					
2 Information Regarding Contribu		• • • •	-		
Check here ► ☐ If the foundation					
the foundation makes gifts, grants, etc	··	<del></del>		<del>_</del>	<u> </u>
a The name, address, and telephone nur					
EXECUTIVE DIRECTOR,					
600 MONTGOMERY ST.,	<del></del> -			-2803	
b The form in which applications should SEE STATEMENT B	be submitted and informat	ion and materials they sh	ould include. 		
c Any submission deadlines NONE					
d Any restrictions or limitations on awar	ds, such as by geographica	al areas, charitable fields, l	kınds of institutions, or o	ther factors	
NONE	, , , , , , , , , , , , , , , , , , ,				

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Part XV Supplementary Information				
3 Grants and Contributions Paid During the Y	ear or Approved for Future I	Payment		
Recipient  Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		
a Paid during the year				
		:		
SEE STATEMENT A			IRC SEC. 501(C)(3)	
		· · · · · · · · · · · · · · · · · · ·	UNRESTRICTED	4,356,250
Total	<u> </u>		<b>▶</b> 3a	4,356,250
b Approved for future payment		<del></del>		
NONE				
· · · · · · · · · · · · · · · · · · ·			<del>                                     </del>	
Total	· · ·		<b>&gt;</b> 3b	0.

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

Enter gross amounts unless otherwise indicated	Unrelat	ed business income		ded by section 512, 513, or 514	(e)
•	(a) Business	(b) Amount	Exclu- sion	(d) Amount	Related or exempt function income
1 Program service revenue	code		code		
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			14	58.	
4 Dividends and interest from securities			14		
5 Net rental income or (loss) from real estate			<del></del>		. ,
a Debt-financed property			<b></b>		
i i i	-	<del></del>			
b Not debt-financed property					<u> </u>
6 Net rental income or (loss) from personal property					
7 Other investment income			14	<249.	>
8 Gain or (loss) from sales of assets other					
than inventory			18	848,733.	
9 Net income or (loss) from special events				0107.000	-
10 Gross profit or (loss) from sales of inventory					
11 Other revenue.		<del></del>			<u> </u>
_					
<u>a</u>					
b					
<u> </u>				<del></del>	
d					
e				1 200 545	0.
12 Subtotal Add columns (b), (d), and (e)		0.		1,386,545.	1 206 545
13 Total. Add line 12, columns (b), (d), and (e)	•	•		. 13	1,386,545.
(See worksheet in line 13 instructions to verify calculations )		· <del></del>		<del> </del>	
Part XVI-B Relationship of Activities to	the Acc	omplishment of Ex	emp	t Purposes	
Line No. Explain below how each activity for which incom		to actions (a) of Dark VIII A			antich most of
Explain below how each activity for which income the foundation's exempt purposes (other than by			COILL	nuteu importantiy to the accom	ipiisiiriieiit oi
N/A	, providing id	ndo for oddin parpossor,			
		<del></del>			
				•	
				· • •	
				<u> </u>	
	<del>- · · · ·</del>				
323621 10-10-13	· · · · · · · -			·	Form <b>990-PF</b> (2013)
10-10-13					FUIIII <b>330-F</b> F (2013)

Part X	Information Re Exempt Organ		To and Transactions an	nd Relationships With Nonch	aritable	!	90 .0
1 Did			ollowing with any other organization	described in section 501(c) of		Yes	No
			tion 527, relating to political organiz				
	sfers from the reporting found						
(1)	Cash		1a(1)	]	X		
(2)	Other assets .	-	_		1a(2)		X
<b>b</b> Othe	r transactions						
(1)	Sales of assets to a noncharita	able exempt organization			1b(1)		X
(2)	Purchases of assets from a no	oncharitable exempt organiza	tion		16(2)		X
(3)	Rental of facilities, equipment,	or other assets			1b(3)		_X
(4)	Reimbursement arrangements	<b>;</b>			1b(4)		X
(5)	Loans or loan guarantees				1b(5)		X
	Performance of services or me				1b(6)		X
	ing of facilities, equipment, ma				10	j	<u>X</u>
				ys show the fair market value of the goods		ets,	
				in any transaction or sharing arrangement,	, show in		
	mn (d) the value of the goods,	·					
(a) Line no	(b) Amount involved		ritable exempt organization	(d) Description of transfers, transactions, an	d sharing arra	angeme	nts
	<del></del>	N,	/A				
	ļ <u>.</u>	ļ					
		<u> </u>					
		1					
	<u>.</u>						
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		<del> </del>					
		1	<del> </del>				
				-	<del></del>		
-		<u> </u>					
	<u> </u>	<u> </u>					
		•	o, one or more tax-exempt organizat	tions described			,
in se	ction 501(c) of the Code (othe	r than section 501(c)(3)) or i	n section 527?		Yes	X	No
<u>b If "Ye</u>	es," complete the following sch						
	(a) Name of org	janization	(b) Type of organization	(c) Description of relation	ship		
	N/A						
	·						
	Under penalties of penjury, I declare and belief, it is true, correct and con	that I have examined this return, i	ncluding accompanying schedules and sta	atements, and to the best of my knowledge	lay the IRS di	scuss t	nis
Sigit			, a san a pa, a, a				
Here	1 MOR	7 41/1//	mi				
	Signature of officer or trustee		Date				
	Print/Type preparer's na	ame Prepar	er's signature				
			nlume				
Paid	SABRINA A.	CHIN	numi				
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	Firm's address ▶ 10	0 FIRST STREE	ET, STE				
	SA	N FRANCISCO,					

# Jaquelin Hume Foundation

EIN: 94-608009

# Grants 2013

Grantee	Amount	Purpose of grant
Alliance for Excellent Education	300,000	IRC Sec 501 "C" "3" Unrestricted
American Enterprise Institute	50,000	IRC Sec 501 "C" "3" Unrestricted
CA Teachers Empowerment Network	25,000	IRC Sec 501 "C" "3" Unrestricted
Cascade Policy Institute	25,000	IRC Sec 501 "C" "3" Unrestricted
Center for Education Reform	150,000	IRC Sec 501 "C" "3" Unrestricted
Colorado Legacy Foundation	200,000	IRC Sec 501 "C" "3" Unrestricted
D.C. Public Education Fund	250,000	IRC Sec 501 "C" "3" Unrestricted
Digital Promise	25,000	IRC Sec 501 "C" "3" Unrestricted
Editorial Projects in Education	50,000	IRC Sec 501 "C" "3" Unrestricted
Education Next	50,000	IRC Sec 501 "C" "3" Unrestricted
Education Superhighway	100,000	IRC Sec 501 "C" "3" Unrestricted
Eldergivers	5,000	IRC Sec 501 "C" "3" Unrestricted
Freedom Foundation	25,000	IRC Sec 501 "C" "3" Unrestricted
Foundation for Excellence in Education	200,000	IRC Sec 501 "C" "3" Unrestricted
Foundation for Teaching Economics	31,250	IRC Sec 501 "C" "3" Unrestricted
Georgia Public Policy Foundation	25,000	IRC Sec 501 "C" "3" Unrestricted
GreatSchools.net	50,000	IRC Sec 501 "C" "3" Unrestricted
Hechinger Institute	150,000	IRC Sec 501 "C" "3" Unrestricted
Illinois Policy Institute	40,000	IRC Sec 501 "C" "3" Unrestricted
iNACOL	275,000	IRC Sec 501 "C" "3" Unrestricted
Independence Institute	40,000	IRC Sec 501 "C" "3" Unrestricted
Innosight Institute	340,000	IRC Sec 501 "C" "3" Unrestricted
Thomas Jefferson Institute	25,000	IRC Sec 501 "C" "3" Unrestricted
Knowledge Works	200,000	IRC Sec 501 "C" "3" Unrestricted
The Learning Accelerator	500,000	IRC Sec 501 "C" "3" Unrestricted
Learning Matters	125,000	IRC Sec 501 "C" "3" Unrestricted
Lexington Institute	· ·	IRC Sec 501 "C" "3" Unrestricted
Mackinac Center for Public Policy	50,000	IRC Sec 501 "C" "3" Unrestricted
James Madison Institute	35,000	IRC Sec 501 "C" "3" Unrestricted
Maine Heritage Policy Center	30,000	IRC Sec 501 "C" "3" Unrestricted
National Center on Time & Learning	200,000	IRC Sec 501 "C" "3" Unrestricted
Nat'l Assoc. of State Board of Education	40,000	IRC Sec 501 "C" "3" Unrestricted
Pacific Research Institute	50,000	IRC Sec 501 "C" "3" Unrestricted
The Philanthropy Roundtable	25,000	IRC Sec 501 "C" "3" Unrestricted
Rhode Island Foundation	70,000	IRC Sec 501 "C" "3" Unrestricted
San Francisco Opera	150,000	IRC Sec 501 "C" "3" Unrestricted
San Francisco Symphony	200,000	IRC Sec 501 "C" "3" Unrestricted
SMUIN Ballet	25,000	IRC Sec 501 "C" "3" Unrestricted

State Policy Network	50,000 IRC Sec 501 "C" "3" Unrestricted
Sutherland Institute	50,000 IRC Sec 501 "C" "3" Unrestricted
Texas Public Policy Foundation	30,000 IRC Sec 501 "C" "3" Unrestricted
VOISE Academy	25,000 IRC Sec 501 "C" "3" Unrestricted
Washington Policy Center	20,000 IRC Sec 501 "C" "3" Unrestricted
Total Grants	4,356,250

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## JAQUELIN HUME FOUNDATION 600 Montgomery Street, Suite 2800 San Francisco, CA 94111 (415) 705-5112

#### PROGRAM GUIDELINES

#### GENERAL AREAS OF INTEREST

The Jaquelin Hume Foundation was established in San Francisco in 1962 by Mr. and Mrs. Jaquelin H. Hume.

A major portion of the funds at the disposal of the Jaquelin Hume Foundation is used to support activities or organizations having a national impact. These funds are disbursed in major grants which are closely monitored to compare the results with the purpose of the grant. Generally, grants will be made for operations, not equipment or buildings.

The major grants of the Jaquelin Hume Foundation will fall into two primary areas:

- 1. Education of young people to be better citizens, to have sound values, and to appreciate the value of our free enterprise, incentive-based economy. Grants are aimed at the junior high and high school levels.
- Improvement of the structure and function of government and the reduction of the influence of the Federal government in our lives.

The balance of the funds of the Jaquelin Hume Foundation will be used to support organizations at the sole discretion of Mrs. Jaquelin H. Hume, the Foundation's president.

#### APPLICATION GUIDELINES

In keeping with Jaquelin Hume's philosophy of giving and to be as effective as possible in making grant determinations, the following general guidelines apply:

- o Organizations must be classified as 501(c)(3) by the Internal Revenue Service.
- o Organizations must operate within the continental United States.
- o Special Projects are generally preferred.
- o The Foundation generally will not consider institutions or organizations primarily supported by tax-derived funding, including those organizations which may have lost significant government funding.
- o The Foundation will not consider grants to institutions which, in policy or practice, unfairly discriminate on the basis of race, creed, or sex.
- o The Foundation will consider only one request from an organization during any twelve-month period.

Grantees must be able to demonstrate competent administrative capabilities and provide the Foundation with periodic progress reports on programs which the Foundation has funded. Institutions which receive support are responsible to account for how grants from the Foundation have been utilized.

The Jaquelin Hume Foundation has a policy of assessing the results of the grants it awards. It recommends, therefore, that evaluation and follow-up procedures be incorporated into grant requests. Such procedures help to assure the Foundation that the funds awarded are being used for the intended purposes and help both the Foundation and grantee to assess the extent to which the project is achieving the expected results.

#### APPLICATION PROCEDURES

Applicants should prepare a preliminary one-page letter which outlines the objectives and significance of the proposed project, the design of the project, and the qualifications of the organization and its individuals. Included with the letter should be a copy of the organization's most recent audited financial statements, a projected budget for the project, the amount of support sought from the Foundation, as well as from other funders.

To ensure eligibility for a grant, the applicant should also submit a copy of the IRS letter confirming the organization's tax-exempt status.

All requests will be reviewed and acknowledged promptly. After a review of the initial letter, the Foundation staff will communicate with the person in charge of the proposed project, indicating whether the project qualifies for further consideration. Applicants whose projects meet these criteria will be invited to submit a fully developed proposal.

While grants will be considered throughout the year, the full board meets twice a year to consider major grants.

Proposals and requests for information should be addressed to:

Executive Director
Jaquelin Hume Foundation
600 Montgomery Street, Suite 2800
San Francisco, CA 94111

SOURCE	C) JSTED INCOME
TOTAL TO PART I, LINE 3 58. 58.  FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEM  CAPITAL (A) (B)  SOURCE AMOUNT DIVIDENDS PER BOOKS MENT INCOME NET  DIVIDEND INCOME 538,003. 0. 538,003. 538,003.  TO PART I, LINE 4 538,003. 0. 538,003. 538,003.  FORM 990-PF OTHER INCOME STATEM  (A) (B)  REVENUE NET INVEST- ADD  REVENUE NET INVEST- ADD  REVENUE NET INVEST- ADD  MORGAN STANLEY VENTURES PARTNERS  III	
FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEM  CAPITAL (A) (B)  SOURCE GROSS GAINS REVENUE NET INVEST- AL  AMOUNT DIVIDENDS PER BOOKS MENT INCOME NET  DIVIDEND INCOME 538,003. 0. 538,003. 538,003.  TO PART I, LINE 4 538,003. 0. 538,003. 538,003.  FORM 990-PF OTHER INCOME STATEM  (A) (B) (B)  REVENUE NET INVEST- ADDRESSED NET INCOME NET  MORGAN STANLEY VENTURES PARTNERS  III	
CAPITAL (A) (B) SOURCE GROSS GAINS REVENUE NET INVEST- AL AMOUNT DIVIDENDS PER BOOKS MENT INCOME NET DIVIDEND INCOME 538,003. 0. 538,003. 538,003.  TO PART I, LINE 4 538,003. 0. 538,003. 538,003.  FORM 990-PF OTHER INCOME STATEM  (A) (B) REVENUE NET INVEST- ADJ PER BOOKS MENT INCOME NET MORGAN STANLEY VENTURES PARTNERS III < <249.> <249.> <249.>	
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TO PART I, LINE 4 538,003. 0. 538,003. 538,003.  FORM 990-PF OTHER INCOME STATEM  (A) (B) (B) (C) (B) (C) (C) (C) (C) (C) (C) (C) (C) (C) (C	(C) JUSTED INCOME
FORM 990-PF  OTHER INCOME  (A)  REVENUE  NET INVEST-  ADD  MORGAN STANLEY VENTURES PARTNERS  III  (249.> (249.>	
(A) (B) (REVENUE NET INVEST- ADDRESCRIPTION PER BOOKS MENT INCOME NET MORGAN STANLEY VENTURES PARTNERS III <a href="mailto:color: red;">(249.&gt;</a>	
DESCRIPTION  MORGAN STANLEY VENTURES PARTNERS  III  REVENUE NET INVEST- ADD PER BOOKS MENT INCOME NET	ient 3
<pre></pre>	C) USTED INCOME
TOTAL TO FORM 990-PF, PART I, LINE 11 <249.> <249.>	
FORM 990-PF LEGAL FEES STATEM	ient 4
	(D) ARITABLE JRPOSES
LEGAL FEES 620. 0.	620.
TO FM 990-PF, PG 1, LN 16A 620. 0.	

DESCRIPTION	FORM 990-PF	ACCOUNTI	NG FEES	S	TATEMENT 5
TO FORM 990-PF, PG 1, LN 16B	DESCRIPTION	EXPENSES	NET INVEST-	ADJUSTED	(D) CHARITABLE PURPOSES
Ca	TAX ACCOUNTANT	9,500.	4,750.		4,750.
CA	TO FORM 990-PF, PG 1, LN 16B	9,500.	4,750.		4,750.
EXPÉNSES   NET ÎNVEST-   ADJUSTED   CHARÎTĂBL   PER BOOKS   MENT INCOME   NET INCOME   PURPOSES	FORM 990-PF (	OTHER PROFES	SIONAL FEES	S	TATEMENT 6
AUDIT EXPENSES 10,500. 0. 10,500  TO FORM 990-PF, PG 1, LN 16C 43,511. 33,011. 10,500  FORM 990-PF TAXES STATEMENT   (A) (B) (C) (D) CHARITABL PER BOOKS MENT INCOME NET INCOME PURPOSES  EXCISE TAX 60,000. 0. 0. 0. 0  TO FORM 990-PF, PG 1, LN 18 60,000. 0. 0. 0  FORM 990-PF OTHER EXPENSES STATEMENT  (A) (B) (C) (D) CHARITABL PURPOSES  EXCISE TAX 60,000. 0. 0. 0. 0  TO FORM 990-PF OTHER EXPENSES STATEMENT  (A) (B) (C) (D) CHARITABL PURPOSES  FINANCIAL ADMINISTRATION 27,225. 13,613. 13,613  COMPUTER SERVICES 1,500. 0. 1,500  OFFICE EXPENSE 166. 0. 166  FEES AND LICENSES 160. 0. 166  BANK FEES 43. 0. 43	DESCRIPTION	EXPENSES	NET INVEST-	ADJUSTED	(D) CHARITABLE PURPOSES
FORM 990-PF  TAXES  (A)  EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME PURPOSES  EXCISE TAX  (B)  EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME PURPOSES  (A)  EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME PURPOSES  (A)  EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME PURPOSES  FINANCIAL ADMINISTRATION  COMPUTER SERVICES FINANCIAL ADMINISTRATION  COMPUTER SERVICES 1,500.  1,500  OFFICE EXPENSE 166. 0. 166  FEES AND LICENSES 160. 0. 43					0. 10,500.
(A)	TO FORM 990-PF, PG 1, LN 16C	43,511.	33,011.		10,500.
EXPENSES   NET INVEST   ADJUSTED   CHARITABLE	FORM 990-PF	TAX	ES	S'	PATEMENT 7
TO FORM 990-PF, PG 1, LN 18 60,000. 0. 0  FORM 990-PF OTHER EXPENSES STATEMENT  (A) (B) (C) (D)  EXPENSES NET INVEST- ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES  FINANCIAL ADMINISTRATION 27,225. 13,613. 13,613  COMPUTER SERVICES 1,500. 0. 1,500  OFFICE EXPENSE 166. 0. 166 FEES AND LICENSES 160. 0. 160 BANK FEES 43. 0. 43	DESCRIPTION	EXPENSES	NET INVEST-	ADJUSTED	CHARITABLE
Ca	EXCISE TAX	60,000.	0.		0.
(A) (B) (C) (D)  EXPENSES NET INVEST— ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES  FINANCIAL ADMINISTRATION COMPUTER SERVICES OFFICE EXPENSE 1,500. 0. 1,500 0. 166. FEES AND LICENSES 160. 0. 160. 160. 160. 160. 160. 160. 1	TO FORM 990-PF, PG 1, LN 18	60,000.	0.		0.
DESCRIPTION  EXPENSES NET INVEST- ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES  FINANCIAL ADMINISTRATION COMPUTER SERVICES OFFICE EXPENSE 166. 0. 166 FEES AND LICENSES 160. 0. 160 BANK FEES 43. 0.  CHARITABLE PURPOSES 13,613. 13,613 1,500 0. 1,500 0. 1,500 166 0. 160 160 160	FORM 990-PF	OTHER E	XPENSES	S	PATEMENT 8
COMPUTER SERVICES       1,500.       0.       1,500         OFFICE EXPENSE       166.       0.       166         FEES AND LICENSES       160.       0.       160         BANK FEES       43.       0.       43	DESCRIPTION	<b>EXPENSES</b>	NET INVEST-	ADJUSTED	CHARITABLE
TO FORM 990-PF, PG 1, LN 23 29,094. 13,613. 15,482	COMPUTER SERVICES OFFICE EXPENSE FEES AND LICENSES	1,500. 166. 160.	0. 0. 0.		13,613. 1,500. 166. 160. 43.
	TO FORM 990-PF, PG 1, LN 23	29,094.	13,613.		15,482.

FORM 990-PF C	CORPORATE STOCK		STATEMENT 9
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
STOCK INVESTMENT		20,897,140.	18,230,419.
TOTAL TO FORM 990-PF, PART II, LI	NE 10B	20,897,140.	18,230,419.
FORM 990-PF	OTHER ASSETS		STATEMENT 10
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
MORGAN STANLEY VENTURE PARTNERS	39,705.	39,456.	39,456.
TO FORM 990-PF, PART II, LINE 15	39,705.	39,456.	39,456.