

Form 990-PF
Department of the Treasury
Internal Revenue Service

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

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

OMB No. 1545-0052

2019

Open to Public Inspection

For calendar year 2019, or tax year beginning 01-01-2019, and ending 12-31-2019

Name of foundation: THE PATRICIA AND CHRISTOPHER WEIL FAMILY FOUNDATION
A Employer identification number: 33-0833801
B Telephone number: (858) 724-6040
C If exemption application is pending, check here
G Check all that apply: Initial return, Final return, Address change, etc.
H Check type of organization: Section 501(c)(3) exempt private foundation
I Fair market value of all assets at end of year: \$ 5,024,389
J Accounting method: Cash

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Administrative Expenses (13-23).

|        |   |         |         |         |
|--------|---|---------|---------|---------|
| Operat | <b>24 Total operating and administrative expenses.</b><br>Add lines 13 through 23 . . . . . | 29,019  | 29,019  | 0       |
|        | <b>25</b> Contributions, gifts, grants paid . . . . .                                       | 909,855 |         | 909,855 |
|        | <b>26 Total expenses and disbursements.</b> Add lines 24 and 25                             | 938,874 | 29,019  | 909,855 |
|        | <b>27</b> Subtract line 26 from line 12:  |         |         |         |
|        | <b>a Excess of revenue over expenses and disbursements</b>                                  | 881,286 |         |         |
|        | <b>b Net investment income</b> (if negative, enter -0-)                                     |         | 206,141 |         |
|        | <b>c Adjusted net income</b> (if negative, enter -0-)                                       |         |         |         |

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| 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<br>(a) Book Value  | End of year<br>(b) Book Value (c) Fair Market Value |           |
| Assets  | <b>1</b> Cash—non-interest-bearing . . . . .   |  |   |           |
|   | <b>2</b> Savings and temporary cash investments . . . . .  | 589,655  | 992,437   | 992,437   |
|   | <b>3</b> Accounts receivable ▶ _____<br>Less: allowance for doubtful accounts ▶ _____  |  |   |           |
|   | <b>4</b> Pledges receivable ▶ _____<br>Less: allowance for doubtful accounts ▶ _____   |  |   |           |
|   | <b>5</b> Grants receivable . . . . .   |  |   |           |
|   | <b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .     |  |   |           |
|   | <b>7</b> Other notes and loans receivable (attach schedule) ▶ _____<br>Less: allowance for doubtful accounts ▶ _____                           |  |   |           |
|   | <b>8</b> Inventories for sale or use . . . . .   |  |   |           |
|   | <b>9</b> Prepaid expenses and deferred charges . . . . .   |  |   |           |
|   | <b>10a</b> Investments—U.S. and state government obligations (attach schedule)   |  |   |           |
|   | <b>b</b> Investments—corporate stock (attach schedule) . . . . .   | 3,410,878  | 3,735,439   | 3,881,449 |
|   | <b>c</b> Investments—corporate bonds (attach schedule) . . . . .   |  |   |           |
|   | <b>11</b> Investments—land, buildings, and equipment: basis ▶ _____<br>Less: accumulated depreciation (attach schedule) ▶ _____                |  |   |           |
|   | <b>12</b> Investments—mortgage loans . . . . .   |  |   |           |
|   | <b>13</b> Investments—other (attach schedule) . . . . .  |  |   |           |
|   | <b>14</b> Land, buildings, and equipment: basis ▶ _____<br>Less: accumulated depreciation (attach schedule) ▶ _____                            |  |   |           |
| <b>15</b> Other assets (describe ▶ _____)   | 0  | 150,503  | 150,503   |           |
| <b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) | 4,000,533  | 4,878,379  | 5,024,389   |           |
| Liabilities   | <b>17</b> Accounts payable and accrued expenses . . . . .  | 580  |   |           |
|   | <b>18</b> Grants payable . . . . .   |  |   |           |
|   | <b>19</b> Deferred revenue . . . . .   |  |   |           |
|   | <b>20</b> Loans from officers, directors, trustees, and other disqualified persons   |  |   |           |
|   | <b>21</b> Mortgages and other notes payable (attach schedule) . . . . .  |  |   |           |
|   | <b>22</b> Other liabilities (describe ▶ _____)   | 763  | 0   |           |
| <b>23 Total liabilities</b> (add lines 17 through 22)   | 1,343  | 0  |   |           |
| Assets or Fund Balances   | <b>Foundations that follow FASB ASC 958, check here</b> <input type="checkbox"/><br><b>and complete lines 24, 25, 29 and 30.</b>               |  |   |           |
|   | <b>24</b> Net assets without donor restrictions . . . . .  |  |   |           |
|   | <b>25</b> Net assets with donor restrictions . . . . .   |  |   |           |
|   | <b>Foundations that do not follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/><br><b>and complete lines 26 through 30.</b> |  |   |           |
|   | <b>26</b> Capital stock, trust principal, or current funds . . . . .   | 0  | 0   |           |
| <b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund                              | 0  | 0  |   |           |
| <b>28</b> Retained earnings, accumulated income, endowment, or other funds                            | 3,999,190  | 4,878,379  |   |           |

|            |   |           |           |
|------------|---|-----------|-----------|
| <b>Net</b> | <b>29 Total net assets or fund balances</b> (see instructions) . . . . .              | 3,999,190 | 4,878,379 |
|            | <b>30 Total liabilities and net assets/fund balances</b> (see instructions) . . . . . | 4,000,533 | 4,878,379 |

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

|          |  |          |           |
|----------|--|----------|-----------|
| <b>1</b> | Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) . . . . . | <b>1</b> | 3,999,190 |
| <b>2</b> | Enter amount from Part I, line 27a . . . . .   | <b>2</b> | 881,286   |
| <b>3</b> | Other increases not included in line 2 (itemize) ▶ _____   | <b>3</b> | 0         |
| <b>4</b> | Add lines 1, 2, and 3 . . . . .  | <b>4</b> | 4,880,476 |
| <b>5</b> | Decreases not included in line 2 (itemize) ▶ _____   | <b>5</b> | 2,097     |
| <b>6</b> | Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 . . . . .  | <b>6</b> | 4,878,379 |

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

| <b>(a)</b> 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>(b)</b><br>How acquired<br>P—Purchase<br>D—Donation | <b>(c)</b><br>Date acquired<br>(mo., day, yr.) | <b>(d)</b><br>Date sold<br>(mo., day, yr.) |
|---|--|--|--|
| <b>1 a</b> FIDELITY - 7850  | P  |  |  |
| <b>b</b> FIDELITY - 7850  | P  |  |  |
| <b>c</b> CAPITAL GAINS DIVIDENDS  | P  |  |  |
| <b>d</b>  |  |  |  |
| <b>e</b>  |  |  |  |

  

| <b>(e)</b><br>Gross sales price | <b>(f)</b><br>Depreciation allowed<br>(or allowable) | <b>(g)</b><br>Cost or other basis<br>plus expense of sale | <b>(h)</b><br>Gain or (loss)<br>(e) plus (f) minus (g) |
|---------------------------------|--|---|--|
| <b>a</b> 33,730                 |  | 34,661  | -931   |
| <b>b</b> 456,966                |  | 426,676   | 30,290   |
| <b>c</b> 129,994                |  |   | 129,994  |
| <b>d</b>                        |  |   |  |
| <b>e</b>                        |  |   |  |

  

| <b>(i)</b><br>F.M.V. as of 12/31/69 | <b>(j)</b><br>Adjusted basis<br>as of 12/31/69 | <b>(k)</b><br>Excess of col. (i)<br>over col. (j), if any | <b>(l)</b><br>Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col.(h)) |
|-------------------------------------|--|---|--|
| <b>a</b>                            |  |   | -931   |
| <b>b</b>                            |  |   | 30,290   |
| <b>c</b>                            |  |   | 129,994  |
| <b>d</b>                            |  |   |  |
| <b>e</b>                            |  |   |  |

  

|   |   |         |
|---|---|---------|
| Capital gain net income or (net capital loss)   | 2 | 159,353 |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0-<br>in Part I, line 8 . . . . . | 3 |         |

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

**1** Enter the appropriate amount in each column for each year; see instructions before making any entries.

| <b>(a)</b><br>Base period years Calendar<br>year (or tax year beginning in)   | <b>(b)</b><br>Adjusted qualifying distributions | <b>(c)</b><br>Net value of noncharitable-use assets | <b>(d)</b><br>Distribution ratio<br>(col. (b) divided by col. (c)) |
|---|---|---|--|
| 2018  | 679,038   | 3,705,333   | 0.183260   |
| 2017  | 619,353   | 4,042,154   | 0.153224   |
| 2016  | 586,750   | 3,154,059   | 0.186030   |
| 2015  | 469,648   | 3,429,801   | 0.136932   |
| 2014  | 511,992   | 3,667,482   | 0.139603   |
| <b>2 Total</b> of line 1, column (d) . . . . .  |   |   | <b>2</b> 0.799049  |
| <b>3</b> Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years . . . . . |   |   | <b>3</b> 0.159810  |
| <b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5 . . . . .   |   |   | <b>4</b> 3,792,099   |
| <b>5</b> Multiply line 4 by line 3 . . . . .  |   |   | <b>5</b> 606,015   |

|   |  |         |
|---|--|---------|
| 6 | Enter 1% of net investment income (1% of Part I, line 27b) | 2,061   |
| 7 | Add lines 5 and 6  | 608,076 |
| 8 | Enter qualifying distributions from Part XII, line 4       | 909,855 |

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

|           |  |           |       |
|-----------|--|-----------|-------|
| <b>1a</b> | Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions) |           |       |
| <b>b</b>  | Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b   | <b>1</b>  | 2,061 |
| <b>c</b>  | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)  |           |       |
| <b>2</b>  | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  | <b>2</b>  | 0     |
| <b>3</b>  | Add lines 1 and 2.   | <b>3</b>  | 2,061 |
| <b>4</b>  | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  | <b>4</b>  | 0     |
| <b>5</b>  | <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-   | <b>5</b>  | 2,061 |
| <b>6</b>  | Credits/Payments:  |           |       |
| <b>a</b>  | 2019 estimated tax payments and 2018 overpayment credited to 2019  | <b>6a</b> | 2,600 |
| <b>b</b>  | Exempt foreign organizations—tax withheld at source  | <b>6b</b> |       |
| <b>c</b>  | Tax paid with application for extension of time to file (Form 8868)  | <b>6c</b> | 0     |
| <b>d</b>  | Backup withholding erroneously withheld  | <b>6d</b> | 0     |
| <b>7</b>  | Total credits and payments. Add lines 6a through 6d.   | <b>7</b>  | 2,600 |
| <b>8</b>  | Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.  | <b>8</b>  | 36    |
| <b>9</b>  | <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>  | <b>9</b>  |       |
| <b>10</b> | <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>  | <b>10</b> | 503   |
| <b>11</b> | Enter the amount of line 10 to be: <b>Credited to 2020 estimated tax</b> 503 <b>Refunded</b>   | <b>11</b> | 0     |

**Part VII-A Statements Regarding Activities**

|  | Yes | No |
|--|-----|----|
| <b>1a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?   |     | No |
| <b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition).<br><i>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.</i> |     | No |
| <b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?.  |     | No |
| <b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br><b>(1)</b> On the foundation. ▶ \$ 0 <b>(2)</b> On foundation managers. ▶ \$ 0  |     |    |
| <b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0  |     |    |
| <b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS?<br><i>If "Yes," attach a detailed description of the activities.</i>  |     | No |
| <b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>   |     | No |
| <b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?.   |     | No |
| <b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?.  |     |    |
| <b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br><i>If "Yes," attach the statement required by General Instruction T.</i>  |     | No |
| <b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<br>• By language in the governing instrument, or<br>• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?              | Yes |    |
| <b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>   | Yes |    |
| <b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions)<br>▶ CA   |     |    |
| <b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>   | 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 2019 or the taxable year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV . . . . . | 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 |

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**Part VII-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 <b>WWW.WEILFAMILYFOUNDATION.ORG</b>  | 13 | Yes    |
| 14 | The books are in care of <b>CHRISTOPHER WEIL</b> Telephone no. <b>(858) 724-6040</b><br><br>Located at <b>11236 EL CAMINO REAL SAN DIEGO CA</b> ZIP+4 <b>92130</b>   |    |        |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —check here . . . . . and enter the amount of tax-exempt interest received or accrued during the year . . . . .  | 15 |        |
| 16 | At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . . See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶ | 16 | Yes No |

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

| File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. |  | 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |    |
| (2)   | Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |    |
| (3)   | Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |    |
| (4)   | Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |     |    |
| (6)   | Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |     |    |
| b   | If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions . . . . . Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>   | 1b  |    |
| c   | 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 2019? . . . . .  | 1c  | 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 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019? . . . . . If "Yes," list the years ▶ 20____, 20____, 20____, 20____ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |     |    |
| b   | Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement—see instructions.) . . . . .  | 2b  |    |
| c   | If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____   |     |    |
| 3a  | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   |     |    |
| b   | If "Yes," did it have excess business holdings in 2019 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 2019.) . . . . . | 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 . . . . .   |     |    |

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

|           |   |   |            |           |
|-----------|---|---|------------|-----------|
| <b>5a</b> | During the year did the foundation pay or incur any amount to:  |   | <b>Yes</b> | <b>No</b> |
|           | (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |            |           |
|           | (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |            |           |
|           | (3) Provide a grant to an individual for travel, study, or other similar purposes?  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |            |           |
|           | (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |            |           |
| <b>b</b>  | If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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.                     |   | <b>5b</b>  |           |
|           | Organizations relying on a current notice regarding disaster assistance check here.   | <input type="checkbox"/>  |            |           |
| <b>c</b>  | If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?<br><i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i> | <input type="checkbox"/> Yes <input type="checkbox"/> No            |            |           |
| <b>6a</b> | Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |            |           |
| <b>b</b>  | Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?<br><i>If "Yes" to 6b, file Form 8870.</i>  |   | <b>6b</b>  | <b>No</b> |
| <b>7a</b> | At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |            |           |
| <b>b</b>  | If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?   |   | <b>7b</b>  |           |
| <b>8</b>  | Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |            |           |

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

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

| (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 |
|---|---|---|---|---------------------------------------|
| CHRISTOPHER WEIL<br>11236 EL CAMINO REAL<br>SAN DIEGO, CA 92130   | PRESIDENT<br>0.00   | 0   | 0   | 0                                     |
| PATRICIA WEIL<br>11236 EL CAMINO REAL<br>SAN DIEGO, CA 92130      | SECRETARY/TREASURER<br>0.00                               | 0   | 0   | 0                                     |
| KIT-VICTORIA WELLS<br>11236 EL CAMINO REAL<br>SAN DIEGO, CA 92130 | DIRECTOR<br>0.00  | 0   | 0   | 0                                     |
| MATTHEW WEIL<br>11236 EL CAMINO REAL<br>SAN DIEGO, CA 92130       | DIRECTOR<br>0.00  | 0   | 0   | 0                                     |
| CAITLIN WEIL<br>11236 EL CAMINO REAL<br>SAN DIEGO, CA 92130       | DIRECTOR<br>0.00  | 0   | 0   | 0                                     |
| MACY OLIVAS<br>11236 EL CAMINO REAL<br>SAN DIEGO, CA 92130        | EXECUTIVE DIRECTOR<br>0.00                                | 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 |
|---|---|------------------|---|---------------------------------------|
| NONE  |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |
|   |   |                  |   |                                       |

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

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

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

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

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

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

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

| 1 | Expenses |
|---|----------|
|   |          |
|   |          |
|   |          |
|   |          |
|   |          |

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

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

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

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

|  |           |           |
|--|-----------|-----------|
| <b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: |           |           |
| <b>a</b> Average monthly fair market value of securities. . . . .  | <b>1a</b> | 3,849,847 |
| <b>b</b> Average of monthly cash balances. . . . .   | <b>1b</b> | 0         |
| <b>c</b> Fair market value of all other assets (see instructions). . . . .   | <b>1c</b> | 0         |
| <b>d Total</b> (add lines 1a, b, and c). . . . .   | <b>1d</b> | 3,849,847 |
| <b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and                                    |           |           |



|   |    |   |           |
|---|----|---|-----------|
| 1c (attach detailed explanation).   | 1e | U |           |
| 2 Acquisition indebtedness applicable to line 1 assets.   | 2  |   | 0         |
| 3 Subtract line 2 from line 1d.   | 3  |   | 3,849,847 |
| 4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).  | 4  |   | 57,748    |
| 5 <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5  |   | 3,792,099 |
| 6 <b>Minimum investment return.</b> Enter 5% of line 5.   | 6  |   | 189,605   |

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

|  |    |       |         |
|--|----|-------|---------|
| 1 Minimum investment return from Part X, line 6.   | 1  |       | 189,605 |
| 2a Tax on investment income for 2019 from Part VI, line 5.   | 2a | 2,061 |         |
| b Income tax for 2019. (This does not include the tax from Part VI.)   | 2b |       |         |
| c Add lines 2a and 2b.   | 2c |       | 2,061   |
| 3 Distributable amount before adjustments. Subtract line 2c from line 1.                                     | 3  |       | 187,544 |
| 4 Recoveries of amounts treated as qualifying distributions.   | 4  |       | 0       |
| 5 Add lines 3 and 4.   | 5  |       | 187,544 |
| 6 Deduction from distributable amount (see instructions).  | 6  |       | 0       |
| 7 <b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1. | 7  |       | 187,544 |

**Part XII 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 |  | 909,855 |
| 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:   |    |  |         |
| a Suitability test (prior IRS approval required).  | 3a |  |         |
| b Cash distribution test (attach the required schedule).   | 3b |  |         |
| 4 <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                                    | 4  |  | 909,855 |
| 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. See instructions. | 5  |  | 2,061   |
| 6 <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.   | 6  |  | 907,794 |

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

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

|  | (a)<br>Corpus | (b)<br>Years prior to 2018 | (c)<br>2018 | (d)<br>2019 |
|--|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2019 from Part XI, line 7                                   |               |                            |             | 187,544     |
| 2 Undistributed income, if any, as of the end of 2019:                                 |               |                            |             |             |
| a Enter amount for 2018 only.  |               |                            | 0           |             |
| b Total for prior years: 20___, 20___, 20___   |               | 0                          |             |             |
| 3 Excess distributions carryover, if any, to 2019:                                     |               |                            |             |             |
| a From 2014.   | 332,546       |                            |             |             |
| b From 2015.   | 305,234       |                            |             |             |
| c From 2016.   | 431,923       |                            |             |             |
| d From 2017.   | 420,651       |                            |             |             |
| e From 2018.   | 498,869       |                            |             |             |
| f <b>Total</b> of lines 3a through e.  | 1,989,223     |                            |             |             |
| 4 Qualifying distributions for 2019 from Part XII, line 4: \$ <u>909,855</u>           |               |                            |             |             |
| a Applied to 2018, 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 2019 distributable amount.  |               |                            |             | 187,544     |
| e Remaining amount distributed out of corpus   | 722,311       |                            |             |             |
| 5 Excess distributions carryover applied to 2019.                                      | 0             |                            |             | 0           |
| (If an amount appears in column (d), the same amount must be shown in column (a).)     |               |                            |             |             |
| 6 <b>Enter the net total of each column as indicated below:</b>                        |               |                            |             |             |
| a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5                                    | 2,711,534     |                            |             |             |



|  |           |   |   |   |
|--|-----------|---|---|---|
| <b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .  |           | 0 |   |   |
| <b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . . |           | 0 |   |   |
| <b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions . . . . .  |           | 0 |   |   |
| <b>e</b> Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions . . . . .   |           |   | 0 |   |
| <b>f</b> Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020 . . . . .   |           |   |   | 0 |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) . . . . .      | 0         |   |   |   |
| <b>8</b> Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions) . . . . .   | 332,546   |   |   |   |
| <b>9 Excess distributions carryover to 2020.</b> Subtract lines 7 and 8 from line 6a . . . . .   | 2,378,988 |   |   |   |
| <b>10</b> Analysis of line 9:  |           |   |   |   |
| <b>a</b> Excess from 2015. . . . .   | 305,234   |   |   |   |
| <b>b</b> Excess from 2016. . . . .   | 431,923   |   |   |   |
| <b>c</b> Excess from 2017. . . . .   | 420,651   |   |   |   |
| <b>d</b> Excess from 2018. . . . .   | 498,869   |   |   |   |
| <b>e</b> Excess from 2019. . . . .   | 722,311   |   |   |   |

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

|  |                 |                 |                 |                 |                  |
|--|-----------------|-----------------|-----------------|-----------------|------------------|
| <b>1a</b> If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling. . . . . |                 |                 |                 |                 |                  |
| <b>b</b> Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)        |                 |                 |                 |                 |                  |
| <b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .  | Tax year        | Prior 3 years   |                 |                 | <b>(e) Total</b> |
|  | <b>(a) 2019</b> | <b>(b) 2018</b> | <b>(c) 2017</b> | <b>(d) 2016</b> |                  |
| <b>b</b> 85% of line 2a . . . . .  |                 |                 |                 |                 |                  |
| <b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .   |                 |                 |                 |                 |                  |
| <b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .   |                 |                 |                 |                 |                  |
| <b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .   |                 |                 |                 |                 |                  |
| <b>3</b> Complete 3a, b, or c for the alternative test relied upon:  |                 |                 |                 |                 |                  |
| <b>a</b> "Assets" alternative test—enter:  |                 |                 |                 |                 |                  |
| <b>(1)</b> Value of all assets . . . . .   |                 |                 |                 |                 |                  |
| <b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)   |                 |                 |                 |                 |                  |
| <b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .  |                 |                 |                 |                 |                  |
| <b>c</b> "Support" alternative test—enter:   |                 |                 |                 |                 |                  |
| <b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .                               |                 |                 |                 |                 |                  |
| <b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .   |                 |                 |                 |                 |                  |
| <b>(3)</b> Largest amount of support from an exempt organization   |                 |                 |                 |                 |                  |
| <b>(4)</b> Gross investment income   |                 |                 |                 |                 |                  |

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

|   |
|---|
| <b>1 Information Regarding Foundation Managers:</b>   |
| <b>a</b> 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).) |
| CHRISTOPHER WEIL  |

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

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

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

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

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

**c** Any submission deadlines:

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

**Part XV Supplementary Information** (continued)



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

| Recipient<br>Name and address (home or business)   | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|--|---|--------------------------------|----------------------------------|--------|
| <b>a</b> <i>Paid during the year</i><br>A BRIDGE FOR KIDS<br>5381 MOONLIGHT LANE<br>LA JOLLA, CA 92037 | NONE  | EXEMPT                         | GENERAL FUND                     | 1,013  |
| ACLU FOUNDATION<br>125 BROAD STREET 18TH FLOOR<br>NEW YORK, NY 10004                                   | NONE  | EXEMPT                         | GENERAL FUND                     | 5,000  |
| BALLET THEATRE FOUNDATION<br>890 BROADWAY 3RD FLOOR<br>NEW YORK, NY 10003                              | NONE  | EXEMPT                         | GENERAL FUND                     | 100    |
| BARRIO LOGAN COLLEGE INSTITUTE<br>2114 NATIONAL AVENUE<br>SAN DIEGO, CA 92113                          | NONE  | EXEMPT                         | GENERAL FUND                     | 10,000 |
| CANYON CREST ACADEMY FOUNDATION<br>5951 E VILLAGE CENTER LOOP ROAD<br>SAN DIEGO, CA 92130              | NONE  | EXEMPT                         | GENERAL FUND                     | 4,100  |
| CENTER FOR COMMUNITY SOLUTIONS<br>4508 MISSION BAY DRIVE<br>SAN DIEGO, CA 92109                        | NONE  | EXEMPT                         | GENERAL FUND                     | 12,000 |
| DOCTORS WITHOUT BORDERS<br>PO BOX 5030<br>HAGERSTOWN, MD 21741   | NONE  | EXEMPT                         | GENERAL FUND                     | 10,000 |
| ENVIRONMENTAL DEFENSE FUND<br>1975 CONNECTICUT AVE NW SUITE 600<br>WASHINGTON, DC 20009                | NONE  | EXEMPT                         | GENERAL FUND                     | 5,000  |
| FLIGHT TEST HISTORICAL FOUNDATION<br>PO BOX 57<br>EDWARDS, CA 93523                                    | NONE  | EXEMPT                         | GENERAL FUND                     | 1,000  |
| INEWSOURCE<br>5500 CAMPANILE DRIVE PSFA 361C<br>SAN DIEGO, CA 92182                                    | NONE  | EXEMPT                         | GENERAL FUND                     | 2,000  |
| JEWISH FAMILY SERVICES<br>8804 BALBOA AVENUE<br>SAN DIEGO, CA 92123                                    | NONE  | EXEMPT                         | GENERAL FUND                     | 734    |
| JUST IN TIME FOR FOSTER YOUTH<br>PO BOX 601627<br>SAN DIEGO, CA 92160                                  | NONE  | EXEMPT                         | GENERAL FUND                     | 4,000  |
| LA JOLLA SYMPHONY & CHORUS<br>9500 GILMAN DRIVE UCSD 0361<br>LA JOLLA, CA 92093                        | NONE  | EXEMPT                         | GENERAL FUND                     | 3,500  |
| MAINLY MOZART INC<br>444 WEST BEECH ST 220   | NONE  | EXEMPT                         | GENERAL FUND                     | 26,000 |

|  |      |        |              |         |
|--|------|--------|--------------|---------|
| 777 WEST BEECH ST 220<br>SAN DIEGO, CA 92101   |      |        |              |         |
| NATIONAL CONFLICT RESOLUTION CENTER<br>530 B STREET<br>SAN DIEGO, CA 92101             | NONE | EXEMPT | GENERAL FUND | 5,250   |
| NATURAL RESOURCES DEFENSE COUNCIL<br>40 WEST 20TH STREET<br>NEW YORK, NY 10011         | NONE | EXEMPT | GENERAL FUND | 5,000   |
| NEW YORK CITY BALLET<br>20 LINCOLN CENTER PLAZA<br>NEW YORK, NY 10023                  | NONE | EXEMPT | GENERAL FUND | 200     |
| PLANNED PARENTHOOD FEDERATION OF AMERICA<br>P O BOX 97166<br>WASHINGTON, DC 20090      | NONE | EXEMPT | GENERAL FUND | 5,000   |
| SAN DIEGO ART INSTITUTE<br>1439 EL PRADO<br>SAN DIEGO, CA 92101                        | NONE | EXEMPT | GENERAL FUND | 2,500   |
| SAN DIEGO BOTANIC GARDEN<br>PO BOX 230005<br>ENCINITAS, CA 92023                       | NONE | EXEMPT | GENERAL FUND | 1,000   |
| SAN DIEGO GRANT MAKERS<br>5060 SHOREHAM PLACE SUITE 350<br>SAN DIEGO, CA 92122         | NONE | EXEMPT | GENERAL FUND | 7,500   |
| SAN DIEGO REPERTORY THEATRE<br>79 HORTON PLAZA<br>SAN DIEGO, CA 92101                  | NONE | EXEMPT | GENERAL FUND | 54,600  |
| SCRIPPS HEALTH FOUNDATION<br>PO BOX 2669<br>LA JOLLA, CA 92038                         | NONE | EXEMPT | GENERAL FUND | 1,000   |
| SIERRA CLUB FOUNDATION<br>2101 WEBSTER ST<br>OAKLAND, CA 94612                         | NONE | EXEMPT | GENERAL FUND | 5,000   |
| STUDENTS WITHOUT LIMITS<br>P O BOX 90224<br>SAN DIEGO, CA 92169                        | NONE | EXEMPT | GENERAL FUND | 30,000  |
| THE SAN DIEGO FOUNDATION<br>2508 HISTORIC DECATUR ROAD 20<br>SAN DIEGO, CA 92106       | NONE | EXEMPT | GENERAL FUND | 200     |
| TORREY PINES ASSOCIATION<br>P O BOX 3003<br>DEL MAR, CA 92014                          | NONE | EXEMPT | GENERAL FUND | 1,000   |
| UCSD FOUNDATION<br>9500 GILMAN DRIVE 0083<br>LA JOLLA, CA 92093                        | NONE | EXEMPT | GENERAL FUND | 245,700 |
| UNIVERSITY OF REDLANDS<br>PO BOX 3080<br>REDLANDS, CA 92374                            | NONE | EXEMPT | GENERAL FUND | 35,000  |
| VOICE OF SAN DIEGO<br>110 WEST A STREET 650<br>SAN DIEGO, CA 92101                     | NONE | EXEMPT | GENERAL FUND | 7,500   |
| WORDS ALIVE<br>5111 SANTA FE STREET SUITE 219<br>SAN DIEGO, CA 92109                   | NONE | EXEMPT | GENERAL FUND | 19,050  |
| ASU FOUNDATION<br>PO BOX 2260<br>TEMPE, AZ 85280                                       | NONE | EXEMPT | GENERAL FUND | 2,000   |
| COMIC-COM MUSEUM<br>2131 PAN AMERICAN PLAZA<br>SAN DIEGO, CA 92101                     | NONE | EXEMPT | GENERAL FUND | 3,050   |
| DONORS CHOOSE<br>P O BOX 7247<br>PHILADELPHIA, PA 191706656                            | NONE | EXEMPT | GENERAL FUND | 200     |
| GLOBAL MEDICAL TRAINING<br>2701 E HILL DRIVE<br>ROCK FALLS, IL 61071                   | NONE | EXEMPT | GENERAL FUND | 1,205   |
| INSTITUTE FOR STUDY ABROAD<br>6201 CORPORATE DRIVE SUITE 200<br>INDIANAPOLIS, IN 46278 | NONE | EXEMPT | GENERAL FUND | 3,000   |
| INTERNATIONAL COMMUNITY FOUNDATION<br>2505 N AVENUE<br>NATIONAL CITY, CA 91950         | NONE | EXEMPT | GENERAL FUND | 2,000   |
| MINORITY HUMANITARIAN FOUNDATION<br>1618 SAN MIGUEL AVENUE<br>SPRING VALLEY, CA 91977  | NONE | EXEMPT | GENERAL FUND | 301     |
| NORTH BROOKLYN COALITION<br>HELPNORTHBROOKLYNCOALITIONORG<br>NEW YORK, NY 11201        | NONE | EXEMPT | GENERAL FUND | 1,183   |
| OPERA NEO<br>3356 DALEY CENTER DRIVE 1312<br>SAN DIEGO, CA 92122                       | NONE | EXEMPT | GENERAL FUND | 100     |

|   |      |        |              |         |
|---|------|--------|--------------|---------|
| SAN DIEGO, CA 92123<br>PLAN INTERNATIONAL USA<br>2300 N STREET NW SUITE 350<br>WASHINGTON, DC 20037 | NONE | EXEMPT | GENERAL FUND | 1,000   |
| PLOUGH SHARES FUND<br>315 BAY STREET SUITE 400<br>SAN FRANCISCO, CA 94133                           | NONE | EXEMPT | GENERAL FUND | 200     |
| SAN DIEGO CHILDREN'S CHOIR<br>1620 5TH AVENUE SUITE 300<br>SAN DIEGO, CA 92101                      | NONE | EXEMPT | GENERAL FUND | 1,500   |
| SAN DIEGO FOUNDATION<br>2508 HISTORIC DECATUR ROAD SUITE<br>200<br>SAN DIEGO, CA 92106              | NONE | EXEMPT | GENERAL FUND | 382,769 |
| SDA ACADEMY FOUNDATION<br>800 SANTA FE DRIVE<br>ENCINITAS, CA 92024                                 | NONE | EXEMPT | GENERAL FUND | 500     |
| THE ART OF YOGA PROJECT<br>555 BRYANT STREET 232<br>PALO ALTO, CA 94301                             | NONE | EXEMPT | GENERAL FUND | 200     |
| THE SAN DIEGO MUSEUM OF ART<br>P O BOX 122107<br>DEL MAR, CA 92112                                  | NONE | EXEMPT | GENERAL FUND | 200     |
| UC REGENTS<br>OFFICE OF FINANCIAL AID<br>SANTA BARBARA, CA 93106                                    | NONE | EXEMPT | GENERAL FUND | 500     |
| <b>Total</b> . . . . .  |      |        | <b>3a</b>    | 909,855 |
| <b>b</b> Approved for future payment  |      |        |              |         |
| <b>Total</b> . . . . .  |      |        | <b>3b</b>    | 0       |

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

| Enter gross amounts unless otherwise indicated.                                | Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income<br>(See instructions.) |
|--|---------------------------|---------------|--------------------------------------|---------------|--|
|  | (a)<br>Business code      | (b)<br>Amount | (c)<br>Exclusion code                | (d)<br>Amount |  |
| <b>1</b> Program service revenue:  |                           |               |                                      |               |  |
| <b>a</b> _____   |                           |               |                                      |               |  |
| <b>b</b> _____   |                           |               |                                      |               |  |
| <b>c</b> _____   |                           |               |                                      |               |  |
| <b>d</b> _____   |                           |               |                                      |               |  |
| <b>e</b> _____   |                           |               |                                      |               |  |
| <b>f</b> _____   |                           |               |                                      |               |  |
| <b>g</b> Fees and contracts from government agencies                           |                           |               |                                      |               |  |
| <b>2</b> Membership dues and assessments. . . . .                              |                           |               |                                      |               |  |
| <b>3</b> Interest on savings and temporary cash<br>investments . . . . .       |                           |               |                                      |               |  |
| <b>4</b> Dividends and interest from securities. . . . .                       |                           |               | 14                                   | 75,807        |  |
| <b>5</b> Net rental income or (loss) from real estate:                         |                           |               |                                      |               |  |
| <b>a</b> Debt-financed property. . . . .                                       |                           |               |                                      |               |  |
| <b>b</b> Not debt-financed property. . . . .                                   |                           |               |                                      |               |  |
| <b>6</b> Net rental income or (loss) from personal property                    |                           |               |                                      |               |  |
| <b>7</b> Other investment income. . . . .                                      |                           |               |                                      |               |  |
| <b>8</b> Gain or (loss) from sales of assets other than<br>inventory . . . . . |                           |               | 18                                   | 159,353       |  |
| <b>9</b> Net income or (loss) from special events:                             |                           |               |                                      |               |  |
| <b>10</b> Gross profit or (loss) from sales of inventory                       |                           |               |                                      |               |  |
| <b>11</b> Other revenue: <b>a</b> _____  |                           |               |                                      |               |  |
| <b>b</b> _____   |                           |               |                                      |               |  |
| <b>c</b> _____   |                           |               |                                      |               |  |
| <b>d</b> _____   |                           |               |                                      |               |  |
| <b>e</b> _____   |                           |               |                                      |               |  |
| <b>12</b> Subtotal. Add columns (b), (d), and (e). . . . .                     |                           | 0             |                                      | 235,160       | 0  |
| <b>13 Total.</b> Add line 12, columns (b), (d), and (e). . . . .               |                           |               | <b>13</b>                            | 235,160       | 235,160  |

**Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

| Line No. | Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.) |
|----------|---|
|          |   |
|          |   |
|          |   |



|  |  |  |
|--|--|--|
|  |  |  |
|  |  |  |
|  |  |  |

**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.

Signature of officer or trustee: \_\_\_\_\_ Date: 2020-11-12 Title: \_\_\_\_\_

May the IRS discuss this return with the preparer shown below (see instr.)  Yes  No

**Paid Preparer Use Only**

|  |                      |                    |   |                          |
|--|----------------------|--------------------|---|--------------------------|
| Print/Type preparer's name<br>PHILIP T WRIGHT                    | Preparer's Signature | Date<br>2020-11-11 | Check if self-employed <input type="checkbox"/> | PTIN<br>P00730190        |
| Firm's name ▶ PHILIP T WRIGHT CPA                                |                      |                    |   | Firm's EIN ▶ 26-3047512  |
| Firm's address ▶ 9333 GENESEE AVE STE 110<br>SAN DIEGO, CA 92121 |                      |                    |   | Phone no. (619) 992-3027 |

Form **990-PF** (2019)

**Additional Data**

[Return to Form](#)

**Software ID:**  
**Software Version:**

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

Special Condition Description

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

OMB No. 1545-0047

2019

Attach to Form 990, 990-EZ, or 990-PF. Go to www.irs.gov/Form990 for the latest information.

Table with 2 columns: Name of the organization (THE PATRICIA AND CHRISTOPHER WEIL FAMILY FOUNDATION) and Employer identification number (33-0833801)

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 33 1/3% support test...
For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor...
For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor...

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).

Table with 2 columns: Name of organization (THE PATRICIA AND CHRISTOPHER WEIL) and Employer identification number (33-0833801)



Part I

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

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4  | (c)<br>Total contributions | (d)<br>Type of contribution  |
|------------|--|----------------------------|--|
| 1          | CHRISTOPHER & PATRICIA WEIL<br>13262 CAMINITO MAR VILLA<br>DEL MAR, CA 92014 | \$ 250,000                 | <input checked="" type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash<br><small>(Complete Part II for noncash contributions.)</small> |
| 2          | CHRISTOPHER & PATRICIA WEIL<br>13262 CAMINITO MAR VILLA<br>DEL MAR, CA 92014 | \$ 250,000                 | <input checked="" type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash<br><small>(Complete Part II for noncash contributions.)</small> |
| 3          | CHRISTOPHER & PATRICIA WEIL<br>13262 CAMINITO MAR VILLA<br>DEL MAR, CA 92014 | \$ 85,000                  | <input checked="" type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash<br><small>(Complete Part II for noncash contributions.)</small> |
| 4          | CHRISTOPHER & PATRICIA WEIL<br>13262 CAMINITO MAR VILLA<br>DEL MAR, CA 92014 | \$ 1,000,000               | <input checked="" type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash<br><small>(Complete Part II for noncash contributions.)</small> |
| -          |  | \$                         | <input type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash<br><small>(Complete Part II for noncash contributions.)</small>            |
| -          |  | \$                         | <input type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash<br><small>(Complete Part II for noncash contributions.)</small>            |

Schedule B (Form 990, 990-EZ, or 990-PF) (2019)

|  |  |
|--|--|
| Name of organization<br>THE PATRICIA AND CHRISTOPHER WEIL<br>FAMILY FOUNDATION | Employer identification number<br>33-0833801 |
|--|--|

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

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

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2019)

Schedule B (Form 990, 990-EZ, or 990-PF) (2019)

|  |  |
|--|--|
| Name of organization<br>THE PATRICIA AND CHRISTOPHER WEIL<br>FAMILY FOUNDATION | Employer identification number<br>33-0833801 |
|--|--|

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

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2019)

### Additional Data

[Return to Form](#)

Software ID:  
Software Version:

**efile Public Visual Render** | **ObjectID: 202003199349100620 - Submission: 2020-11-14** | **TIN: 33-0833801**

### TY 2019 IRS 990 e-File Render

**Name:** THE PATRICIA AND CHRISTOPHER WEIL  
FAMILY FOUNDATION

**EIN:** 33-0833801

| Category        | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|-----------------|--------|-----------------------|---------------------|---------------------------------------|
| ACCOUNTING FEES | 22,250 | 22,250                |                     | 0                                     |

**efile Public Visual Render** | **ObjectID: 202003199349100620 - Submission: 2020-11-14** | **TIN: 33-0833801**

### TY 2019 IRS 990 e-File Render

**Name:** THE PATRICIA AND CHRISTOPHER WEIL  
FAMILY FOUNDATION

**EIN:** 33-0833801

| Name of Stock | End of Year Book Value | End of Year Fair Market Value |
|---------------|------------------------|-------------------------------|
| EQUITIES      | 3,735,439              | 3,881,449                     |

**TY 2019 IRS 990 e-File Render**

**Name:** THE PATRICIA AND CHRISTOPHER WEIL  
FAMILY FOUNDATION

**EIN:** 33-0833801

| Description                     | Beginning of Year - Book Value | End of Year - Book Value | End of Year - Fair Market Value |
|---------------------------------|--------------------------------|--------------------------|---------------------------------|
| LOAN RECEIVABLE - SAN DIEGO REP | 0                              | 150,000                  | 150,000                         |
| PREPAID FEDERAL INCOME TAX      | 0                              | 503                      | 503                             |

**TY 2019 IRS 990 e-File Render**

**Name:** THE PATRICIA AND CHRISTOPHER WEIL  
FAMILY FOUNDATION

**EIN:** 33-0833801

| Description | Amount |
|-------------|--------|
| FEDERAL TAX | 2,097  |

**TY 2019 IRS 990 e-File Render**

**Name:** THE PATRICIA AND CHRISTOPHER WEIL  
FAMILY FOUNDATION

**EIN:** 33-0833801

| Description             | Revenue and Expenses per Books | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|-------------------------|--------------------------------|-----------------------|---------------------|---------------------------------------|
| ADMINISTRATIVE EXPENSES | 5,187                          | 5,187                 |                     | 0                                     |
| BANK FEES               | 121                            | 121                   |                     | 0                                     |

**TY 2019 IRS 990 e-File Render**

**Name:** THE PATRICIA AND CHRISTOPHER WEIL  
FAMILY FOUNDATION

**EIN:** 33-0833801

| Description         | Beginning of Year - Book Value | End of Year - Book Value |
|---------------------|--------------------------------|--------------------------|
| ACCRUED FEDERAL TAX | 763                            | 0                        |

**TY 2019 IRS 990 e-File Render**

**Name:** THE PATRICIA AND CHRISTOPHER WEIL  
FAMILY FOUNDATION

**EIN:** 33-0833801

| Category    | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|-------------|--------|-----------------------|---------------------|---------------------------------------|
| FOREIGN TAX | 1,376  | 1,376                 |                     | 0                                     |
| STATE TAX   | 85     | 85                    |                     | 0                                     |