

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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OMB No. 1545-0047

**2023**

Open to Public Inspection

For calendar year **2023**, or tax year beginning **01-01-2023**, and ending **12-31-2023**

Name of foundation THE PATRICIA AND CHRISTOPHER WEIL FAMILY FOUNDATION		<b>A Employer identification number</b> 33-0833801
Number and street (or P.O. box number if mail is not delivered to street address) 11236 EL CAMINO REAL 200	Room/suite	<b>B Telephone number</b> (see instructions) (858) 724-6040
City or town, state or province, country, and ZIP or foreign postal code SAN DIEGO, CA 92130		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here..... <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here ..... <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>5,131,923</u>	<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... <input type="checkbox"/>

<b>Part I Analysis of Revenue and Expenses</b> <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</small>		<b>(a)</b> Revenue and expenses per books	<b>(b)</b> Net investment income	<b>(c)</b> Adjusted net income	<b>(d)</b> Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)	0			
	<b>2</b> Check <input checked="" type="checkbox"/>				
	<b>3</b> Interest on savings and temporary cash investments				
	<b>4</b> Dividends and interest from securities	155,262	154,970		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	52,887			
	<b>b</b> Gross sales price for all assets on line 6a <u>1,841,573</u>				
	<b>7</b> Capital gain net income (from Part IV, line 2)		52,887		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less: Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)					
<b>12 Total.</b> Add lines 1 through 11	208,149	207,857			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc.	0	0		0
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits				
	<b>16a</b> Legal fees (attach schedule)				
	<b>b</b> Accounting fees (attach schedule)	7,619	7,619		0
	<b>c</b> Other professional fees (attach schedule)				
	<b>17</b> Interest	10	10		0
	<b>18</b> Taxes (attach schedule) (see instructions)	2,602	2,602		0
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings				
<b>22</b> Printing and publications					
<b>23</b> Other expenses (attach schedule)	11,816	11,816		0	

01	<b>24 Total operating and administrative expenses.</b>			
	Add lines 13 through 23 . . . . .	22,047	22,047	0
	<b>25 Contributions, gifts, grants paid . . . . .</b>	554,069		554,069
	<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	576,116	22,047	554,069
	<b>27 Subtract line 26 from line 12:</b>			
	<b>a Excess of revenue over expenses and disbursements</b>	-367,967		
	<b>b Net investment income</b> (if negative, enter -0-)		185,810	
	<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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	<b>1</b>	Cash—non-interest-bearing . . . . .			
	<b>2</b>	Savings and temporary cash investments . . . . .	1,124,479	422,032	422,032
	<b>3</b>	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>4</b>	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>5</b>	Grants receivable . . . . .			
	<b>6</b>	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b>	Other notes and loans receivable (attach schedule) ▶ _____ 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) . . . . .	4,213,356	4,543,612	4,708,974
	<b>c</b>	Investments—corporate bonds (attach schedule) . . . . .			
	<b>11</b>	Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b>	Investments—mortgage loans . . . . .			
	<b>13</b>	Investments—other (attach schedule) . . . . .			
	<b>14</b>	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
<b>15</b>	Other assets (describe ▶ _____)	0	917	917	
<b>16</b>	<b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	5,337,835	4,966,561	5,131,923	
Liabilities	<b>17</b>	Accounts payable and accrued expenses . . . . .			
	<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 ▶ _____)	724	0	
<b>23</b>	<b>Total liabilities</b> (add lines 17 through 22)	724	0		
Assets or Fund Balances	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <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"/> <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	5,337,111	4,966,561		

Net A	28	Retained earnings, accumulated income, endowment, or other funds	5,337,111	4,966,561
	29	<b>Total net assets or fund balances</b> (see instructions)	5,337,111	4,966,561
	30	<b>Total liabilities and net assets/fund balances</b> (see instructions)	5,337,835	4,966,561

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

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	5,337,111
2	Enter amount from Part I, line 27a	2	-367,967
3	Other increases not included in line 2 (itemize)	3	0
4	Add lines 1, 2, and 3	4	4,969,144
5	Decreases not included in line 2 (itemize)	5	2,583
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	4,966,561

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a FIDELITY - 7850	P	2022-12-31	2023-06-30
b FIDELITY - 7850	P	2021-01-01	2023-12-31
c CAPITAL GAINS DIVIDENDS	P		
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 670,233		690,733	-20,500
b 1,115,447		1,097,953	17,494
c 55,893			55,893
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (i) over col. (j), if any	(m)
a			-20,500
b			17,494
c			55,893
d			
e			

2	Capital gain net income or (net capital loss) <span style="font-size: small;">{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }</span>	2	52,887
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)	1	2,583
b	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)	2	0
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	3	2,583
3	Add lines 1 and 2.	4	0
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	5	2,583
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	6	
6	Credits/Payments:		
a	2023 estimated tax payments and 2022 overpayment credited to 2023	6a	3,500
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	3,500
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	0

<b>9 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 Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	<b>10</b>	917
<b>11</b> Enter the amount of line 10 to be: <b>Credited to 2024 estimated tax</b> ▶ 917   <b>Refunded</b> ▶	<b>11</b>	0

**Part VI-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 the instructions for the definition. . . . . <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: <b>(1)</b> On the foundation. ▶ \$ <u>0</u> <b>(2)</b> On foundation managers. ▶ \$ <u>0</u>		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ <u>0</u>		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <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? . . . . . <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: <input type="checkbox"/> round bullet By language in the governing instrument, or <input checked="" type="checkbox"/> round bullet 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 XIV.</i> . . . . .	Yes	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ <u>CA</u>		
<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	
<b>9</b> 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 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i> . . . . .		No
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> . . . . .		No
<b>11</b> At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," attach schedule. See instructions.</i> . . . . .		No
<b>12</b> Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i> . . . . .		No
<b>13</b> Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>WWW.WEILFAMILYFOUNDATION.ORG</u>	Yes	
<b>14</b> The books are in care of ▶ <u>SVETLANA WEIL</u> Telephone no. ▶ <u>(858) 724-6040</u>  Located at ▶ <u>11236 EL CAMINO REAL SUITE 200 SAN DIEGO CA</u> ZIP+4 ▶ <u>92130</u>		
<b>15</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —check here . . . . . ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶ <b>15</b>		
<b>16</b> At any time during calendar year 2023, 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. <i>If "Yes," enter the name of the foreign country</i> ▶		No

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

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

Table with 3 columns: Question, Yes, No. Rows include 1a(1) through 4b regarding foundation activities like engaging in sales, borrowing money, and distributing income.

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

Table with 3 columns: Question, Yes, No. Rows include 5a through 6b regarding foundation activities like propaganda, grants, and personal benefit contracts.

If "Yes" to 6b, file Form 8870.

<b>7a</b>	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		<b>No</b>
<b>b</b>	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .		
<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? . . . . .		<b>No</b>

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CHRISTOPHER WEIL 11236 EL CAMINO REAL SAN DIEGO, CA 92130	PRESIDENT 2.00	0	0	0
PATRICIA WEIL 11236 EL CAMINO REAL SAN DIEGO, CA 92130	SECRETARY/TREASURER 2.00	0	0	0
KIT-VICTORIA WELLS 11236 EL CAMINO REAL SAN DIEGO, CA 92130	DIRECTOR 6.00	0	0	0
MATTHEW WEIL 11236 EL CAMINO REAL SAN DIEGO, CA 92130	DIRECTOR 2.00	0	0	0
CAITLIN WEIL 11236 EL CAMINO REAL SAN DIEGO, CA 92130	DIRECTOR 3.00	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 VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

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

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

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

**Part VIII-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

2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions.	
3	
<b>Total.</b> Add lines 1 through 3	0

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**Part IX 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>	5,181,714
<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>	5,181,714
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	0
<b>2</b> Acquisition indebtedness applicable to line 1 assets.	<b>2</b>	0
<b>3</b> Subtract line 2 from line 1d.	<b>3</b>	5,181,714
<b>4</b> Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	<b>4</b>	77,726
<b>5 Net value of noncharitable-use assets.</b> Subtract line 4 from line 3.	<b>5</b>	5,103,988
<b>6 Minimum investment return.</b> Enter 5% (0.05) of line 5.	<b>6</b>	255,199

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

<b>1</b> Minimum investment return from Part IX, line 6.	<b>1</b>	255,199
<b>2a</b> Tax on investment income for 2022 from Part V, line 5.	<b>2a</b>	2,583
<b>b</b> Income tax for 2022. (This does not include the tax from Part V.)	<b>2b</b>	
<b>c</b> Add lines 2a and 2b.	<b>2c</b>	2,583
<b>3</b> Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	252,616
<b>4</b> Recoveries of amounts treated as qualifying distributions.	<b>4</b>	0
<b>5</b> Add lines 3 and 4.	<b>5</b>	252,616
<b>6</b> Deduction from distributable amount (see instructions).	<b>6</b>	0
<b>7 Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	<b>7</b>	252,616

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

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b> Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	<b>1a</b>	554,069
<b>b</b> Program-related investments—total from Part VIII-B.	<b>1b</b>	0
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b> Suitability test (prior IRS approval required).	<b>3a</b>	

3b	
4	554,069

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

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				252,616
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			0	
b Total for prior years: 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018.	498,869			
b From 2019.	722,311			
c From 2020.	839,213			
d From 2021.	861,899			
e From 2022.	1,061,545			
f Total of lines 3a through e.	3,983,837			
4 Qualifying distributions for 2023 from Part XI, line 4: \$ 554,069				
a Applied to 2022, 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 2023 distributable amount.				252,616
e Remaining amount distributed out of corpus	301,453			
5 Excess distributions carryover applied to 2023. (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	4,285,290			
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 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions).	498,869			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a.	3,786,421			
10 Analysis of line 9:				
a Excess from 2019.	722,311			
b Excess from 2020.	839,213			
c Excess from 2021.	861,899			
d Excess from 2022.	1,061,545			
e Excess from 2023.	301,453			

**Part XIII Private Operating Foundations** (see instructions and Part VI-A, question 9)

1a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2023, enter the date of the ruling.	
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)



	Tax year		Prior 3 years		(e) Total
	(a) 2023	(b) 2022	(c) 2021	(d) 2020	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed . . . . .					
<b>b</b> 85% (0.85) of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XI, 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 IX, 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 XIV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)**

**1 Information Regarding Foundation Managers:**

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



CHRISTOPHER WEIL

PATRICIA 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:



Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i>  CATALYST OF SAN DIEGO AND IMPERIAL COUNTIES  5060 SHOREHAM PLACE SUITE 350 SAN DIEGO, CA 92122	NONE	EXEMPT	GENERAL FUND	1,500
CENTER FOR COMMUNITY SOLUTIONS  4508 MISSION BAY DRIVE SAN DIEGO, CA 92109	NONE	EXEMPT	GENERAL FUND	11,500
ENVIRONMENTAL DEFENSE FUND  1875 CONNECTICUT AVE NW STE 600 WASHINGTON, DC 20009	NONE	EXEMPT	GENERAL FUND	5,000
INEWSOURCE  PO BOX 34546 SAN DIEGO, CA 92163	NONE	EXEMPT	GENERAL FUND	20,000
JACOBS & CUSHMAN SAN DIEGO FOOD BANK  9850 DISTRIBUTION AVE SAN DIEGO, CA 92121	NONE	EXEMPT	GENERAL FUND	2,000
JACOBS CENTER FOR NEIGHBORHOOD INNOVATION  404 EUCLID AVE SAN DIEGO, CA 92114	NONE	EXEMPT	GENERAL FUND	10,000
LA JOLLA SYMPHONY & CHORUS  9500 GILMAN DRIVE UCSD 0361 LA JOLLA, CA 92093	NONE	EXEMPT	GENERAL FUND	3,000
MAINLY MOZART INC  404 EUCLID AVE SUITE 221 SAN DIEGO, CA 92114	NONE	EXEMPT	GENERAL FUND	26,000
NORTH COAST REPERTORY THEATRE  987 LOMAS SANTA FE SUITE D SOLANA BEACH, CA 92075	NONE	EXEMPT	GENERAL FUND	300
PAN-MASS CHALLENGE INC  77 4TH AVE NEEDHAM, MA 02494	NONE	EXEMPT	GENERAL FUND	500
PLANNED PARENTHOOD FEDERATION OF AMERICA  P O BOX 97166 WASHINGTON, DC 20090	NONE	EXEMPT	GENERAL FUND	5,000
SAN DIEGUITO ACADEMY FOUNDATION  PO BOX 235109 ENCINITAS, CA 92023	NONE	EXEMPT	GENERAL FUND	500
SIERRA CLUB FOUNDATION  2101 WEBSTER ST OAKLAND, CA 94612	NONE	EXEMPT	GENERAL FUND	5,000
THE OLD GLOBE THEATRE  PO BOX 122171 SAN DIEGO, CA 92112	NONE	EXEMPT	GENERAL FUND	1,000
THE SAN DIEGO FOUNDATION  2508 HISTORIC DECATUR ROAD 20	NONE	EXEMPT	GENERAL FUND	417,044

SAN DIEGO, CA 92106				
UCSD FOUNDATION 9500 GILMAN DRIVE 0940 LA JOLLA, CA 92093	NONE	EXEMPT	GENERAL FUND	21,100
UNIVERSITY OF REDLANDS PO BOX 3080 REDLANDS, CA 92373	NONE	EXEMPT	GENERAL FUND	10,000
WORDS ALIVE 5111 SANTA FE STREET SUITE 219 SAN DIEGO, CA 92109	NONE	EXEMPT	GENERAL FUND	200
ALVIN AILEY DANCE FOUNDATION 405 WEST 55TH ST 4TH FLOOR NEW YORK, NY 100194402	NONE	EXEMPT	GENERAL FUND	300
ALZHEIMER'S ASSOCIATION 225 N MICHIGAN AVE 17TH FLOOR CHICAGO, IL 60601	NONE	EXEMPT	GENERAL FUND	1,000
COHO PRODUCTIONS LTD 2257 NW RALEIGH ST PORTLAND, OR 97210	NONE	EXEMPT	GENERAL FUND	7,000
GLOBAL COMMUNITIES 5151 MURPHY CANYON RD SUITE 320 SAN DIEGO, CA 92123	NONE	EXEMPT	GENERAL FUND	1,000
KE' AUN DENT 1984 HOWELL MILL RD NW ATLANTA, GA 30327	NONE	EXEMPT	GENERAL FUND	2,250
LAWRENCE FAMILY JEWISH COMMUNITY CENTER 4126 EXECUTIVE DRIVE LA JOLLA, CA 92037	NONE	EXEMPT	GENERAL FUND	500
PLEDGELING FOUNDATION FOR THE FURTHER BENEFIT OF AMYLOIDOSIS RESEARCH 2261 MARKET ST 5042 SAN FRANCISCO, CA 94114	NONE	EXEMPT	GENERAL FUND	500
PORTLAND EXPERIMENTAL THEATRE ENSEMBLE 4241 NE 70TH AVE PORTLAND, OR 97218	NONE	EXEMPT	GENERAL FUND	1,000
RONALD MCDONALD HOUSE CHARITIES OF SAN DIEGO 2929 CHILDRENS WAY SAN DIEGO, CA 92123	NONE	EXEMPT	GENERAL FUND	375
ROSE HAVEN - PORTLAND PO BOX 10405 PORTLAND, OR 97296	NONE	EXEMPT	GENERAL FUND	500
<b>Total . . . . .</b>			<b>3a</b>	<b>554,069</b>

**b** *Approved for future payment*






<b>Paid Preparer Use Only</b>	PHILIP T WRIGHT	2024-07-09	Check if self-employed <input type="checkbox"/>	P00730190
	Firm's name ▶ PHILIP T WRIGHT CPA			Firm's EIN ▶ 26-3047512
	Firm's address ▶ 4350 EXECUTIVE DR STE 350 SAN DIEGO, CA 92121			Phone no. (619) 992-3027

Form **990-PF** (2023)

**Additional Data**

[Return to Form](#)

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

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

Special Condition Description
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**efile Public Visual Render** | ObjectId: 202411919349100206 - Submission: 2024-07-09 | TIN: 33-0833801

**TY 2023 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	7,619	7,619		0

**efile Public Visual Render** | ObjectId: 202411919349100206 - Submission: 2024-07-09 | TIN: 33-0833801

**TY 2023 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	4,543,612	4,708,974

**TY 2023 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
PREPAID FEDERAL INCOME TAX	0	917	917

**TY 2023 IRS 990 e-File Render**

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

**EIN:** 33-0833801

Description	Amount
FEDERAL TAX	2,583

**TY 2023 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	897	897		0
BANK FEES	544	544		0
MANAGEMENT FEES	10,000	10,000		0
OTHER	375	375		0

**TY 2023 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
FEDERAL INCOME TAX DUE	724	0

**TY 2023 IRS 990 e-File Render**

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**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	2,502	2,502		0
STATE TAX	100	100		0