Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

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

OMB No. 1545-0047

2022

Open to Public Inspection

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

Name of foundation
THE GEORGE K BAUM FAMILY FOUNDATION

A Employer identification number
35-2481660

Number and street (or P.O. box number if mail is not delivered to street address)
4801 MAIN STREET 500

Room/suite

B Telephone number (see instructions)
(816) 842-0944

City or town, state or province, country, and ZIP or foreign postal code
KANSAS CITY, MO 64112

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

D 1. Foreign organizations, check here............ ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here .... ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16*) ▶$ 29,036,155

J Accounting method: ☐ Cash ☑ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here .... ▶ ☐

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

		Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue		1	Contributions, gifts, grants, etc., received (attach schedule)				
		2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
		3	Interest on savings and temporary cash investments	3,432	3,432		
		4	Dividends and interest from securities . . .	519,164	519,164		
		5a	Gross rents				
		b	Net rental income or (loss)				
		6a	Net gain or (loss) from sale of assets not on line 10	-1,182,348			
		b	Gross sales price for all assets on line 6a 13,882,442				
		7	Capital gain net income (from Part IV, line 2) . . .		0		
		8	Net short-term capital gain				
		9	Income modifications				
		10a	Gross sales less returns and allowances				
		b	Less: Cost of goods sold				
		c	Gross profit or (loss) (attach schedule)				
		11	Other income (attach schedule)	58,747	85,903	0	
		12	**Total.** Add lines 1 through 11	-601,005	608,499	0	
Operating and Administrative Expenses		13	Compensation of officers, directors, trustees, etc.	0	0	0	0
		14	Other employee salaries and wages				
		15	Pension plans, employee benefits				
		16a	Legal fees (attach schedule)				
		b	Accounting fees (attach schedule)	6,800	3,400	0	3,400
		c	Other professional fees (attach schedule)	170,649	152,399	0	18,250
		17	Interest				
		18	Taxes (attach schedule) (see instructions) . . .	16,144	1,172	0	0
		19	Depreciation (attach schedule) and depletion . . .				
		20	Occupancy				
		21	Travel, conferences, and meetings	155	78	0	77
		22	Printing and publications				
		23	Other expenses (attach schedule)		85,508		
		24	**Total operating and administrative expenses.** Add lines 13 through 23	193,748	242,557	0	21,727
		25	Contributions, gifts, grants paid	913,000			913,000
		26	**Total expenses and disbursements.** Add lines 24 and 25	1,106,748	242,557	0	934,727
		27	Subtract line 26 from line 12:				
		a	**Excess of revenue over expenses and disbursements**	-1,707,753			
		b	**Net investment income** (if negative, enter -0-)		365,942		
		c	**Adjusted net income** (if negative, enter -0-) . . .			0	

Part II	Balance Sheets — Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets 1	Cash—non-interest-bearing			
2	Savings and temporary cash investments			
3	Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
4	Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U.S. and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)	28,291,492	26,633,574	25,439,918
c	Investments—corporate bonds (attach schedule)			
11	Investments—land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	1,949,632	306,954	306,954
14	Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)	1,842,747	3,263,667	3,289,283
16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	32,083,871	30,204,195	29,036,155
Liabilities 17	Accounts payable and accrued expenses		18,250	
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)	0	18,250	
Net Assets or Fund Balances	**Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.**			
24	Net assets without donor restrictions			
25	Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☑ and complete lines 26 through 30.			
26	Capital stock, trust principal, or current funds	0	0	
27	Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
28	Retained earnings, accumulated income, endowment, or other funds	32,083,871	30,185,945	
29	**Total net assets or fund balances** (see instructions)	32,083,871	30,185,945	
30	**Total liabilities and net assets/fund balances** (see instructions)	32,083,871	30,204,195	

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	32,083,871
2	Enter amount from Part I, line 27a	2	-1,707,753
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	30,376,118
5	Decreases not included in line 2 (itemize) ▶	5	190,173
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	30,185,945

Part IV Capital Gains and Losses for Tax on Investment Income

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

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	13,882,442		15,064,790	-1,182,348
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
a				-1,182,348
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	-1,182,348
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	0

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶☐ and enter "N/A" on line 1. Date of ruling or determination letter: _________ **(attach copy of letter if necessary–see instructions)**			1	5,087
b	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	0
3	Add lines 1 and 2			3	5,087
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	5,087
6	Credits/Payments:				
a	2022 estimated tax payments and 2021 overpayment credited to 2022	6a	27,997		
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	27,997
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2221 is attached.			8	0
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	22,910
11	Enter the amount of line 10 to be: **Credited to 2023 estimated tax** ▶ 22,910	**Refunded** ▶		11	0

Part VI-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0 **(2)** On foundation managers. ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XIV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶MO			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2022 or the taxable year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VI-A Statements Regarding Activities (continued)

		Line	Yes	No
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?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶GREATER KANSAS CITY COMMUNITY FOUND Telephone no. ▶(816) 842-0944

Located at ▶1055 BROADWAY SUITE 130 KANSAS CITY MO ZIP+4 ▶64105

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

		Line	Yes	No
16	At any time during calendar year 2022, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?.	1a(1)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)		No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?.	1a(5)		No
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		
c	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2022?	1d		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?.	2a		No
	If "Yes," list the years ▶ 20___ , 20___ , 20___ , 20___			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20___ , 20___ , 20___ , 20___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?.	3a		No
b	If "Yes," did it have excess business holdings in 2022 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period?*(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2022.)*.	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2022?	4b		No

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

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

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
ANN KAUFMANN BAUM 4801 MAIN STREET SUITE 500 KANSAS CITY, MO 64112	TRUSTEE 1.00	0	0	0
JONATHAN E BAUM 4801 MAIN STREET SUITE 500 KANSAS CITY, MO 64112	TRUSTEE 1.00	0	0	0
JANICE C KREAMER 4801 MAIN STREET SUITE 500 KANSAS CITY, MO 64112	TRUSTEE 1.00	0	0	0
BRUCE C DAVISON 4801 MAIN STREET SUITE 500 KANSAS CITY, MO 64112	TRUSTEE 1.00	0	0	0
LISA KLEIN 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105	TRUSTEE 1.00	0	0	0
SARAH BAUM 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105	TRUSTEE 1.00	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

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- Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	31,380,031
b	Average of monthly cash balances	1b	0
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	31,380,031
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	31,380,031
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	470,700
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3.	5	30,909,331
6	**Minimum investment return.** Enter 5% (0.05) of line 5	6	1,545,467

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

1	Minimum investment return from Part IX, line 6	1	1,545,467
2a	Tax on investment income for 2022 from Part V, line 5 — 2a: 5,087		
b	Income tax for 2022. (This does not include the tax from Part V.) — 2b: 8,610		
c	Add lines 2a and 2b	2c	13,697
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,531,770
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	1,531,770
6	Deduction from distributable amount (see instructions)	6	0
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	1,531,770

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	934,727
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part XII, line 4.	4	934,727

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				1,531,770
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only.			0	
b Total for prior years: 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2017. 33,177				
b From 2018. 67,041				
c From 2019.				
d From 2020. 580,726				
e From 2021.				
f **Total** of lines 3a through e	680,944			
4 Qualifying distributions for 2022 from Part XI, line 4: ▶ $ 934,727				
a Applied to 2021, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2022 distributable amount				934,727
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2022. *(If an amount appears in column (d), the same amount must be shown in column (a).)*	597,043			597,043
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	83,901			
b Prior years' undistributed income. Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount —see instructions		0		
e Undistributed income for 2021. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0			
8 Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions) . . .	0			
9 **Excess distributions carryover to 2023.** Subtract lines 7 and 8 from line 6a	83,901			
10 Analysis of line 9:				
a Excess from 2018				
b Excess from 2019				
c Excess from 2020. . . . 83,901				
d Excess from 2021				
e Excess from 2022				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2022, enter the date of the ruling . . . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2022	**(b)** 2021	**(c)** 2020	**(d)** 2019	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: **a** "Assets" alternative test—enter: **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed					
c "Support" alternative test—enter: **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number or 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 XIV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
BOYS & GIRLS CLUB OF GREATER KANSAS CITY 4001 BLUE PARKWAY SUITE 102 KANSAS CITY,MO 64130	NONE	PC	SOCIETAL BENEFIT	133,000
DELASALLE EDUCATION CENTER 3737 TROOST AVENUE KANSAS CITY,MO 64109	NONE	PC	EDUCATIONAL	100,000
FRONT PORCH ALLIANCE 3210 MICHIGAN AVENUE KANSAS CITY,MO 64109	NONE	PC	SOCIAL BENEFIT	500
GRANDPARENTS AGAINST GUN VIOLENCE 4520 MAIN STREET KANSAS CITY,MO 64111	NONE	PC	SOCIETAL BENEFIT	1,000
GREATER KANSAS CITY COMMUNITY FOUNDATION 1055 BROADWAY BLVD STE 130 KANSAS CITY,MO 64105	NONE	PC	SOCIAL BENEFIT	250
GREEN LIGHT FUND 200 CLAREDON STREET 44TH FLOOR BOSTON,MA 02116	NONE	PC	SOCIETAL BENEFIT	50,000
GUADALUPE CENTERS 1015 AVENIDA CESAR KANSAS CITY,MO 64108	NONE	PC	SOCIETAL BENEFIT	75,000
KANSAS CITY FRIENDS OF ALVIN AILEY 1714 E 18TH STREET KANSAS CITY,MO 64108	NONE	PC	SOCIETAL BENEFIT	7,500
KANSAS CITY SCHOLARS 8080 WARD PARKWAY SUITE 402 KANSAS CITY,MO 64114	NONE	PC	EDUCATIONAL	50,000
KC PUBLIC SCHOOLS EDUCATIONAL FOUNDATION 2901 TROOST AVENUE KANSAS CITY,MO 64109	NONE	PC	EDUCATIONAL	82,000
MINDDRIVE 2615 HOLMES STREET KANSAS CITY,MO 64108	NONE	PC	EDUCATIONAL	50,000
OPERATION BREAKTHROUGH 3039 TROOST AVENUE KANSAS CITY,MO 64109	NONE	PC	SOCIAL BENEFIT	80,000
THE CHILDREN'S SPOT AT SAINT LUKE'S 901 E 104TH STREET SUITE 100 KANSAS CITY,MO 64131	NONE	PC	MEDICAL PRACTICE & RESEARCH	20,000
JUNIOR ACHIEVEMENT OF GREATER KANSAS CITY 2842 W 47TH AVENUE KANSAS CITY,MO 66103	NONE	PC	EDUCATIONAL	100,000
WECODEKC	NONE	PC	EDUCATIONAL	100,000

4741 CENTRAL ST SUITE 222 KANSAS CITY,MO 64112				
MIRACLE OF INNOCENCE 13725 METCALF AVENUE OVERLAND PARK,KS 66223	NONE	PC	SOCIETAL BENEFIT	250
CHARLIE'S HOUSE 6324 N CHATHAM AVENUE SUITE 223 KANSAS CITY,MO 64151	NONE	PC	SOCIETAL BENEFIT	250
LEAD TO READ 6022 N STRATHBURY AVENUE KANSAS CITY,MO 64151	NONE	PC	EDUCATIONAL	50,000
KANSAS MISSOURI MENTAL HEALTH COLLABORATIVE 2011 W 91ST STREET LEAWOOD,KS 66206	NONE	PC	HEALTHCARE	250
KCPT PUBLIC TELEVISION 125 E 31ST STREET KANSAS CITY,MO 64108	NONE	PC	SOCIETAL BENEFIT	2,000
TRUMAN LIBRARY INSTITUTE 5151 TROOST AVENUE SUITE 300 KANSAS CITY,MO 64110	NONE	PC	SOCIETAL BENEFIT	3,000
PAWSPERITY 5829 TROOST AVENUE SUITE B KANSAS CITY,MO 64110	NONE	PC	SOCIETAL BENEFIT	500
KANSAS CITY GIFT 5008 PROPSECT AVENUE KANSAS CITY,MO 64130	NONE	PC	SOCIETAL BENEFIT	7,500
Total . . . . ▶ **3a**				913,000
b *Approved for future payment*				
BOYS & GIRLS CLUB OF GREATR KANSAS CITY 4001 BLUE PARKWAY SUITE 102 KANSAS CITY,MO 64130	NONE	PC	SOCIETAL BENEFIT	134,000
DELASALLE EDUCATION CENTER 3737 TROOST AVENUE KANSAS CITY,MO 64109	NONE	PC	EDUCATIONAL	100,000
KANSAS CITY SCHOLARS 8080 WARD PARKWAY SUITE 402 KANSAS CITY,MO 64114	NONE	PC	EDUCATIONAL	50,000
OPERATION BREAKTHROUGH 3039 TROOST AVENUE KANSAS CITY,MO 64109	NONE	PC	SOCIAL BENEFIT	75,000
UNITED INNER CITY SERVICES - ST MARK'S 2008 E 12TH STREET KANSAS CITY,MO 64127	NONE	PC	SOCIETAL BENEFIT	200,000
MINDDRIVE 2615 HOLMES STREET KANSAS CITY,MO 64108	NONE	PC	EDUCATIONAL	50,000
JUNIOR ACHIEVEMENT OF GREATER KANSAS CITY 2842 W 47TH AVENUE KANSAS CITY,MO 66103	NONE	PC	EDUCATIONAL	100,000
Total . . . . ▶ **3b**				709,000

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions.)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	3,432	
4 Dividends and interest from securities			14	519,164	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			01	58,747	
8 Gain or (loss) from sales of assets other than inventory			18	-1,182,348	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		-601,005	0

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 -601,005

(See worksheet in line 13 instructions to verify calculations.)

Part XV-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 XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

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

(a) Line No.	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule.

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

Sign Here

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

Signature of officer or trustee	Date: 2023-10-30	Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
ERIN S MORGAN				P00710515

Firm's name ▶ RUBINBROWN LLP

Firm's EIN ▶43-0765316

Firm's address ▶ 1200 MAIN STREET SUITE 1000

KANSAS CITY, M O 64105

Phone no. (816) 472-1122

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2022 IRS 990 e-File Render

Name: THE GEORGE K BAUM FAMILY FOUNDATION

EIN: 35-2481660

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING & TAX SERVICE	6,800	3,400	0	3,400

TY 2022 IRS 990 e-File Render

Name: THE GEORGE K BAUM FAMILY FOUNDATION

EIN: 35-2481660

Name of Stock	End of Year Book Value	End of Year Fair Market Value
BLACKROCK HIGH YIELD BOND	594,166	508,410
FIDELITY 500 INDEX	10,623,976	10,452,236
FIDELITY INTL	566,885	532,280
HEALTHCARE SELECT SECTOR	1,266,097	1,461,474
INVESCO	1,974,471	1,750,525
ISHARES CORE	341,811	264,976
ISHARES INC	254,609	251,135
ISHARES RUSSELL	1,337,931	1,445,376
ISHARES TR MSCI CANADA	194,145	192,191
ISHARES TR MSCI JAPAN	381,249	336,004
JP MORGAN MANAGED INCOME FUND	734,322	730,943
OAKMARK INTERNATIONAL	565,366	532,655
PARNASSUS FD	2,035,839	1,820,139
PGIM HIGH YIELD	617,648	508,551
SCHWAB US TIPS	455,755	382,314
T ROWE PRICE INTL	401,038	263,828
VANECK GOLD	385,312	270,665
VANECK OIL SERVICES	334,887	528,439
VANGUARD FTSE EUROPE	290,592	268,995
VANGUARD MID-CAP	599,129	588,196
VANGUARD TOTAL BOND MARKET	2,678,346	2,350,586

TY 2022 IRS 990 e-File Render

Name: THE GEORGE K BAUM FAMILY FOUNDATION

EIN: 35-2481660

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
CASH ACCOUNT	AT COST	306,954	306,954

TY 2022 IRS 990 e-File Render

Name: THE GEORGE K BAUM FAMILY FOUNDATION

EIN: 35-2481660

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
FLINT HILLS ASCENT CO-INVEST II LP	477,854	503,182	529,540
FLINT HILLS FOUNDERS II LP	314,895	317,672	339,935
GKB GROWTH EQUITY FUND	186,177	137,335	216,223
COATUE ASIA OFFSHORE FUND I PRIVATE INVESTORS LT HF CLASS	113,711	251,179	194,391
COATUE GROWTH PRIVATE INVESTORS OFFSHORE LP DIK CLASS A-3 CLOSE EQT	324,319	370,581	342,518
EQT INFRASTRUCTURE PRIVATE INVESTORS OFFSHORE	149,947	253,001	260,176
PE OFFSHORE LP CLASS A	87,500	146,659	189,546
PSG V PRIVATE INVESTORS OFFSHORE	34,696	99,405	103,543
RC II PRIVATE INVESTORS OFFSHORE	91,148	157,141	151,957
SVSS V PRIVATE OMVESTPRS OFFSHORE	62,500	100,000	107,196
COATUE CLIMATE TECH OFFSHORE FEEDER FUND II LP		500,000	473,144
ASF VII INFRASTRUCTURE PRIVATE INVESTORS OFFSHORE		62,906	69,593
NEA 18 PRIVATE INVESTORS OFFSHORE		191,246	147,580
PSG ENCORE/CO-INVEST J OFFSHORE		173,360	163,941

TY 2022 IRS 990 e-File Render

Name: THE GEORGE K BAUM FAMILY FOUNDATION

EIN: 35-2481660

Description	Amount
BOOK/TAX TIMING DIFFERENCE	190,173

TY 2022 IRS 990 e-File Render

Name: THE GEORGE K BAUM FAMILY FOUNDATION

EIN: 35-2481660

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP INCOME	58,747	85,903	0

TY 2022 IRS 990 e-File Render

Name: THE GEORGE K BAUM FAMILY FOUNDATION

EIN: 35-2481660

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	134,149	134,149	0	0
ADMINISTRATION FEES	36,500	18,250	0	18,250

TY 2022 IRS 990 e-File Render

Name: THE GEORGE K BAUM FAMILY FOUNDATION

EIN: 35-2481660

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	1,172	1,172	0	0
FEDERAL TAXES	14,972	0	0	0