

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

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

Name of foundation THE PACKARD HUMANITIES INSTITUTE
A Employer identification number 94-3038401
B Telephone number (see instructions) (650) 948-0150
C If exemption application is pending, check here
D 1. Foreign organizations, check here
D 2. Foreign organizations meeting the 85% test, check here and attach computation ...
E If private foundation status was terminated under section 507(b)(1)(A), check here
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here
H Check type of organization: Section 501(c)(3) exempt private foundation
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 833,843,798
J Accounting method: Accrual

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))

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), followed by summary rows 27-29.

**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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .			
	<b>2</b> Savings and temporary cash investments . . . . .	358,413,534	263,326,288	263,326,288
	<b>3</b> Accounts receivable ▶ <u>1,958,996</u>			
	Less: allowance for doubtful accounts ▶ _____	377,889	1,958,996	1,958,996
	<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 . . . . .	4,351,753	4,308,144	4,308,144
	<b>9</b> Prepaid expenses and deferred charges . . . . .	16,364	16,364	16,364
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule) . . . . .			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	112,215,594	83,755,739	83,755,739
	<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) . . . . .	189,421,180	284,561,511	284,561,511	
<b>14</b> Land, buildings, and equipment: basis ▶ <u>198,930,811</u>				
Less: accumulated depreciation (attach schedule) ▶ <u>34,048,086</u>	168,492,171	164,882,725	164,882,725	
<b>15</b> Other assets (describe ▶ _____)	30,611,879	31,034,031	31,034,031	
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	863,900,364	833,843,798	833,843,798	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	2,045,011	945,230	
	<b>18</b> Grants payable . . . . .	420,000		
	<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 ▶ _____)	1,546,825	1,377,284	
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	4,011,836	2,322,514	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .	859,888,528	831,521,284	
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .			
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .			
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds . . . . .			
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	859,888,528	831,521,284		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	863,900,364	833,843,798		

**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>	859,888,528
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-19,206,921
<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>	840,681,607
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	9,160,323
<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>	831,521,284

**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> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
<b>1 a PUBLICLY TRADED SECURITIES</b>			
<b>b</b> BLACKSTONE REAL ESTATE VII PRIVATE - DISTRIBUTIONS IN EXCESS OF BASIS	P	2012-07-18	2022-12-31
<b>c</b> JP MORGAN CHINA - DISTRIBUTIONS IN EXCESS OF BASIS	P	2012-04-27	2022-12-31
<b>d</b>			
<b>e</b>			

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
<b>a</b> 14,909,065		3,856,552	11,052,513
<b>b</b> 3,139,616			3,139,616
<b>c</b> 237,837			237,837
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

<b>(i)</b> F.M.V. as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
<b>a</b>			11,052,513
<b>b</b>			3,139,616
<b>c</b>			237,837
<b>d</b>			
<b>e</b>			

Capital gain net income or (net capital loss)	<b>2</b>	14,429,966
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<b>3</b> 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	<b>3</b>	
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Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

Table with 11 main rows and sub-rows (a-e) for credits and payments. Includes fields for tax under section 511, tax based on investment income, and total tax due/overpayment.

Part VI-A Statements Regarding Activities

Table with 10 main rows (1a-10) and sub-rows (a-e) regarding activities. Includes questions about political campaigns, unrelated business income, and state reporting requirements.

Part VI-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.
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.
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.PACKHUM.ORG
14 The books are in care of THE FOUNDATION Telephone no. (650) 948-0150 Located at 300 SECOND STREET LOS ALTOS CA ZIP+4 94022
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
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? 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.

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?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(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)?
(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.)
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
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?
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
a At the end of tax year 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?. If "Yes," list the years 20, 20, 20, 20
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.)
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?
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.)
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
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?

**Part VI-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>
<b>(1)</b> Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		<b>5a(1)</b>		<b>No</b>
<b>(2)</b> Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?		<b>5a(2)</b>		<b>No</b>
<b>(3)</b> Provide a grant to an individual for travel, study, or other similar purposes?		<b>5a(3)</b>		<b>No</b>
<b>(4)</b> Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions		<b>5a(4)</b>	<b>Yes</b>	
<b>(5)</b> Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?		<b>5a(5)</b>		<b>No</b>
<b>b</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		<b>5b</b>		<b>No</b>
<b>c</b> Organizations relying on a current notice regarding disaster assistance check <input type="checkbox"/>				
<b>d</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? If "Yes," attach the statement required by Regulations section 53.4945–5(d).		<b>5d</b>	<b>Yes</b>	
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		<b>6a</b>		<b>No</b>
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		<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?		<b>7a</b>		<b>No</b>
<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?		<b>8</b>		<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
DAVID W PACKARD PHI 300 SECOND STREET LOS ALTOS, CA 94022	PRES/CHAIR/DIR 30.00	0	0	0
BARBARA P WRIGHT PHI 300 SECOND STREET LOS ALTOS, CA 94022	SECRETARY 1.00	0	0	0
SI WHITE PHI 300 SECOND STREET LOS ALTOS, CA 94022	TREASURER/CFO 25.00	161,285	62,131	0
WALTER B HEWLETT PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
WILLIAM A JOHNSON PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
CHRISTOPH J WOLFF PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
RICHARD HODGES PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
ARIANNA PACKARD MARTELL PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
WOODLEY PACKARD PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 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
WILKINS POE 300 SECOND ST LOS ALTOS, CA 94022	EDITOR-PROGRAMMER 40.00	199,507	83,377	0
MATTHEW YOW 26155 ROCKWELL CANYON ROAD SANTA CLARITA, CA 91355	FACILITY MANAGER 40.00	170,239	61,283	0
PATRICK LOUGHNEY 26155 ROCKWELL CANYON ROAD SANTA CLARITA, CA 91355	DIRECTOR 40.00	199,148	31,563	0
PAUL CORNEILSON 11-A MT AUBURN STREET CAMBRIDGE, MA 02138	MANAGING EDITOR 40.00	134,050	70,616	0
BRUCE NICHOLS 26155 ROCKWELL CANYON ROAD SANTA CLARITA, CA 91355	PROGRAM MANAGER 40.00	140,087	58,071	0

**Total** number of other employees paid over \$50,000. ▶ 26

**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
JP MORGAN CHASE BANK NA 270 PARK AVENUE NEW YORK, NY 100172014	INVESTMENT SERVICES	521,213
HYDEA VIA DEL ROSSO FIORENTINO IT	CULTURAL HERITAGE CONSULTING	333,174
SOPHILOS EE 40 FRAGKOPOULOU KIFISSIA GR	DATA RECORDING SYSTEM	181,940
BEAR IMAGES 198 MISSISSIPPI STREET SAN FRANCISCO, CA 94107	CONSULTING	156,800
IWAMOTOSCOTT ARCHITECTURE LLP 128 TEXAS STREET SAN FRANCISCO, CA 94107	ARCHITECT	138,050

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

**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
<b>1</b> HUMANITIES DATA BASE PROJECTS: SUPPORT FOR THE PRESERVATION, EDITING, AND DISEMINATION OF HISTORICAL MUSIC (INCLUDING C.P.E. BACH AND MOZART) AND DOCUMENTS (INCLUDING GREEK INSCRIPTION)	2,138,296
<b>2</b> CONSTRUCTION COSTS AND OPERATING COSTS FOR THE PHI STOA IN SANTA CLARITA, CA	3,367,136
<b>3</b> FILM PRESERVATION AND DIGITIZATION PROJECTS	2,939,001
<b>4</b> COSTS FOR THE PROJECT AT THE HERCULANEUM	703,292

**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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3 . . . . .	<b>0</b>

**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>	96,607,865
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	320,321,901
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	225,066,644
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	641,996,410
<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>	641,996,410
<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>	9,629,946
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3.. . . .	<b>5</b>	632,366,464
<b>6</b>	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5. . . . .	<b>6</b>	31,618,323

**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>	31,618,323
<b>2a</b>	Tax on investment income for 2022 from Part V, line 5. . . . .	<b>2a</b>	263,478
<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>	263,478
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	31,354,845
<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>	31,354,845
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1. . . . .	<b>7</b>	31,354,845

**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>	32,000,505
<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>	540,264
<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>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	<b>4</b>	32,540,769

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

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
<b>1</b> Distributable amount for 2022 from Part X, line 7				31,354,845
<b>2</b> Undistributed income, if any, as of the end of 2022:				
<b>a</b> Enter amount for 2021 only. . . . .			30,141,798	
<b>b</b> Total for prior years: 20___, 20___, 20___		0		
<b>3</b> Excess distributions carryover, if any, to 2022:				
<b>a</b> From 2017. . . . .				
<b>b</b> From 2018. . . . .				
<b>c</b> From 2019. . . . .				
<b>d</b> From 2020. . . . .				
<b>e</b> From 2021. . . . .				
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	0			
<b>4</b> Qualifying distributions for 2022 from Part XI, line 4: ▶ \$ <u>32,540,769</u>				
<b>a</b> Applied to 2021, but not more than line 2a			30,141,798	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2022 distributable amount . . . . .				2,398,971
<b>e</b> Remaining amount distributed out of corpus . . . . .	0			
<b>5</b> Excess distributions carryover applied to 2022. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0			
<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 2021. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023 . . . . .				28,955,874
<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 2017 not applied on line 5 or line 7 (see instructions) . . . . .	0			
<b>9</b> <b>Excess distributions carryover to 2023.</b> Subtract lines 7 and 8 from line 6a . . . . .	0			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2018 . . . . .				
<b>b</b> Excess from 2019 . . . . .				
<b>c</b> Excess from 2020. . . . .				
<b>d</b> Excess from 2021 . . . . .				
<b>e</b> Excess from 2022 . . . . .				

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

Table with 5 columns: (a) 2022, (b) 2021, (c) 2020, (d) 2019, (e) Total. Rows include: 1a Date of ruling; b Check box for 4942(j)(3) or 4942(j)(5); 2a-2e Qualifying distributions; 3 Alternative tests (Assets, Endowment, Support).

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** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN FRIENDS OF LEIPZIG BACH-ARCHIV  11A MOUNT AUBURN STREET CAMBRIDGE, MA 02138		P C	CHARITABLE DONATION	30,000
AMERICAN FRIENDS OF LOVEITALY  671 MENLO OAKS DRIVE MENLO PARK, CA 94025		P C	CHARITABLE DONATION	30,000
BOSTON EARLY MUSIC FESTIVAL  43 THORNDIKE STREET SUITE 302 CAMBRIDGE, MA 02141		P C	CHARITABLE DONATION	10,000
BRITISH SCHOOL OF ATHENS  52 SOUEDIAS STREET ATHENS GR10676 GR		N C	KNOSSOS RESEARCH CENTER	2,500,000
GEORGE EASTMAN MUSEUM  MOTION PICTURE DEPARTMENT ROCHESTER, NY 14607		P C	SUPPORT FOR THE MOTION PICTURE DEPARTMENT	1,913,600
HARVARD UNIVERSITY  MASSACHUSETTS HALL CAMBRIDGE, MA 02138		P C	SUPPORT HARVARD UNIVERSITY THE I TATTI RENAISSANCE LIBRARY	500,000
ISTITUTO PACKARD PER I BENI CULTURALI  VIA PALO 25 PISA 56126 IT		N C	SUPPORT HERCULANEUM CONSERVATION PROJECT	880,000
ISTITUTO PACKARD PER I BENI CULTURALI  VIA PALO 25 PISA 56126 IT		N C	SUPPORT PROJECTS ON PURCHASED LAND	540,000
MARLBORO SCHOOL OF MUSIC  1528 WALNUT STREET 301 PHILADELPHIA, PA 19102		P C	CHARITABLE DONATION	15,000
NATIONAL PHILANTHROPIC TRUST  165 TOWNSHIP LINE ROAD JENKINTOWN, PA 19046		P C	GENERAL SUPPORT	7,100,000
NORTH CAROLINA BOTANICAL GARDEN FOUNDATION  100 OLD MASON FARM ROAD CHAPEL HILL, NC 27517		P C	CHARITABLE DONATION	15,000
OPERA SAN JOSE  2149 PARAGON DRIVE SAN JOSE, CA 95131		P C	GENERAL PRODUCTION SUPPORT	750,500
OXFORD UNIVERSITY  WELLINGTON SQUARE OXFORD, OXFORDSHIRE OX1 2JD UK		N C	SUPPORT THE CULTURES OF KNOWLEDGE PROJECT	420,000
OXFORD UNIVERSITY  WELLINGTON SQUARE OXFORD, OXFORDSHIRE OX1 2JD UK		N C	SUPPORT THE CULTURES OF KNOWLEDGE PROJECT	420,000

PRESIDENT AND FELLOWS OF HARVARD UNIVERSITY 74 AUBURN STREET CAMBRIDGE, MA 02138		PC	CHARITABLE DONATION	3,000
PRINCETON UNIVERSITY PRINCETON UNIVERSITY LIBRARY PRINCETON, NJ 08544		PC	SUPPORT OF FOUNDING FATHER OPERATING EXPENSES	2,645,000
ST JOHN'S UNIVERSITY 81-98 170TH STREET JAMAICA, NY 11432		PC	SUPPORT OF ST JOHN'S HILL MUSEUM AND MANUSCRIPT LIBRARY	2,000,000
STANFORD THEATRE FOUNDATION 300 SECOND STREET LOS ALTOS, CA 94022		POF	STANFORD THEATRE GENERAL OPERATING EXPENSES	1,975,000
UCLA FILM ARCHIVE 26155 ROCKWELL CANYON ROAD SANTA CLARITA, CA 91355		PC	SUPPORT OF UCLA FILM PRESERVATION WORK BY UCLA FILM & TELEVISION ARCHIVE 7/1/22-6/30/23	100,000
UCLA FILM ARCHIVE 26155 ROCKWELL CANYON ROAD SANTA CLARITA, CA 91355		PC	SUPPORT OF UCLA FILM RADIO COLLECTION CONSERVATION AND INVENTORY PROJECT	300,000
UNIVERSITY OF NOTRE DAME 724 GRACE HALL NOTRE DAME, IN 46556		PC	SUPPORT OF EXCAVATIONS AT BUTRINT	112,200
<b>Total . . . . .</b>			<b>▶ 3a</b>	<b>22,259,300</b>
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b>			<b>▶ 3b</b>	<b>0</b>

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

- 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
4 Dividends and interest from securities
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
8 Gain or (loss) from sales of assets other than inventory
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).
13 Total. Add line 12, columns (b), (d), and (e).

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Includes rows for interest on savings (14, 15,520), dividends (14, 5,781,234), gain on sales (18, 11,052,513), and subtotal (0, 16,849,267).

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

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

Table with 2 columns: 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. Includes line 10 with detailed text about publishing musical scores.



## **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 PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AUDIT/TAX SERVICES	118,299	3,549	0	139,330

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.									
TY 2022 IRS 990 e-File Render									
Name: THE PACKARD HUMANITIES INSTITUTE									
EIN: 94-3038401									
Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2003-03-10	400,000	HISTORICAL RESEARCH, CONSERVATION AND PUBLICATION OF MUSIC BY BACH	400,000	NONE	2003-2011, 2012, 2014, 2016, 2017, 2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2004-04-29	310,000	HISTORICAL RESEARCH, CONSERVATION AND PUBLICATION OF MUSIC BY BACH	310,000	NONE	2005-2009, 2011, 2012, 2014, 2016, 2017, 2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2007-11-05	1,100,000	RENOVATION OF HISTORIC CONCERT HALL IN LEIPZIG, GERMANY	1,100,000	NONE	2008-2012, 2014, 2016, 2017, 2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2013-03-01	229,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	212,032	NONE	2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2015-04-08	110,500	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	95,865	NONE	2016, 2017, 2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2016-07-20	117,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	113,487	NONE	2017, 2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2017-04-19	153,800	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	153,800	NONE	2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2018-05-01	140,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	140,000	NONE	2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2020-05-04	140,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	140,000	NONE	2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2021-03-08	155,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	41,076	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG GM 04109	2021-11-19	40,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS		NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
INTERNATIONAL MOZARTEUM FOUNDATION	SCHWARZSTRASSE 26 SALZBURG 5020 AU	2001-11-30	3,000,000	SUPPORT FOR ENDOWMENT OF A DIGITAL EDITION OF MOZART	696,809	NONE	2002-2011, 2012, 2014, 2016, 2017, 2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
INTERNATIONAL MOZARTEUM FOUNDATION	SCHWARZSTRASSE 26 SALZBURG 5020 AU	2019-06-04	2,000,000	SUPPORT FOR CREATION OF A DIGITAL EDITION OF MOZART	2,000,000	NONE	2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
INTERNATIONAL MOZARTEUM FOUNDATION	SCHWARZSTRASSE 26 SALZBURG 5020 AU	2021-12-20	1,700,000	SUPPORT FOR THE DIGITAL MOZART EDITION	890,445	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2019-08-16	530,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	530,000	NONE	2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2019-08-16	1,500,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	1,500,000	NONE	2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-01-10	750,000	FUNDS IN SUPPORT OF PROJECT ADJACENT TO THE ARCHAEOLOGICAL SITE OF HERCULANEUM	750,000	NONE	2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-07-27	555,000	FUNDS TO PURCHASE LAND AND BUILDINGS ADJACENT TO THE ARCHAEOLOGICAL SITE OF HERCULANEUM	555,000	NONE	2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-07-27	130,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	130,000	NONE	2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-12-20	994,400	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	994,400	NONE	2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-12-20	406,800	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	406,800	NONE	2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-12-20	156,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	156,000	NONE	2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
SAXON ACADEMY OF SCIENCES	KARL-TAUCHNITZSTRASSE 1 LEIPZIG 04107 GM	2017-10-25	220,000	BACH-REPERTORIUM RESEARCH PROJECT	220,000	NONE	2018, 2019, 2020		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2021-01-15	200,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	200,000	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2021-08-05	200,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	200,000	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2021-12-29	250,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	250,000	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
THE CYPRUS INSTITUTE	20 KOHSTANTINOU KAVFI STREET NICOSIA CY	2020-09-16	75,000	SUPPORT OF RESEARCH FOR KENOS-NAXOS SEAWAYS PROJECT	75,000	NONE	2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
UNIVERSITY OF CAMBRIDGE	TRINITY LANE CAMBRIDGE UK	2020-09-16	75,000	SUPPORT OF RESEARCH FOR KENOS-NAXOS SEAWAYS PROJECT	38,174	NONE	2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2020-08-03	150,000	STANFORD THEATRE GENERAL OPERATING EXPENSES.	150,000	NONE	2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
BRITISH SCHOOL OF ATHENS	52 SOUIDIAS STREET ATHENS GR	2022-12-19	2,500,000	RENOVATION OF BSA KNOSSOS RESEARCH CENTRE		NONE	NOT YET DUE		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2022-03-29	175,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	175,000	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2022-05-16	200,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	200,000	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2022-07-18	150,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	150,000	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2022-07-18	250,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	250,000	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2022-11-07	200,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	200,000	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2022-11-17	200,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	200,000	NONE	2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2022-12-26	500,000	STANFORD THEATRE GENERAL OPERATING EXPENSES		NONE	NOT YET DUE		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ALTOS, CA 94022	2022-12-26	300,000	STANFORD THEATRE GENERAL OPERATING EXPENSES		NONE	NOT YET DUE		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2018-10-29	205,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	203,719	NONE	2018, 2019, 2020, 2021, 2022		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2022-12-26	540,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM		NONE	NOT YET DUE		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2022-12-27	880,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM		NONE	NOT YET DUE		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
OXFORD UNIVERSITY	WELLINGTON SQUARE OXFORD, OXFORDSHIRE OX12JD UK	2022-01-14	420,000	SUPPORT THE CULTURES OF KNOWLEDGE PROJECT		NONE	NOT YET DUE		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
OXFORD UNIVERSITY	WELLINGTON SQUARE OXFORD, OXFORDSHIRE OX12JD UK	2022-12-28	420,000	SUPPORT THE CULTURES OF KNOWLEDGE PROJECT		NONE	NOT YET DUE		TO THE KNOWLEDGE OF PHI, AND BASED ON THE REPORTS BY THE GRANTEE, NO PART OF THE GRANT WAS USED FOR OTHER THAN THE INTENDED PURPOSE, AND NO VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.

# TY 2022 IRS 990 e-File Render

**Name:** THE PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Identifier	Return Reference	Explanation
	FORM 990-PF, PART VI-B, LINE 1A(3) AND 1A(4)	THE LAW FIRM OF FINCH MONTGOMERY WRIGHT PC, 350 CAMBRIDGE AVENUE, SUITE 175, PALO ALTO, CA 94306, WAS PAID \$29,716 FOR LEGAL SERVICES AND REIMBURSEMENT OF RELATED EXPENSES TO THE FOUNDATION IN 2022. BARBARA P. WRIGHT IS AN OFFICER, SECRETARY OF THE FOUNDATION, AND IS A PARTNER OR OWNER OF THE LAW FIRM. SHE RECEIVES NO FEES FOR SERVICES IN HER CAPACITY AS AN OFFICER. THE BOARD APPROVED, BY RESOLUTION, COMPENSATION FOR MRS. WRIGHT'S SERVICES, AND THE REASONABLENESS OF THE BILLING RATES. MRS. WRIGHT IS NOT A MEMBER OF THE BOARD AND CANNOT VOTE.
STATEMENT REGARDING CONTROLLED ENTITIES	FORM 990-PF, PART VII-A, LINE 11	ISITUTO PACKARD PER I BENI CULTURALIVIA PASQUALE PAOLI, 25PISA PL, ITALY 56126AMOUNT OF GRANT TRANSFERRED \$0EXCESS BUSINESS HOLDINGS NO
TANGIBLE PROPERTY REGULATIONS		SECTION 1.263(A)-1(F) DE MINIMIS SAFE HARBOR ELECTIONTAXPAYER IS MAKING THE DE MINIMIS SAFE HARBOR ELECTION UNDER TREAS. REG. 1.263(A)-1(F) FOR ALL ELIGIBLE AMOUNTS PAID OR INCURRED DURING THE TAXABLE YEAR.SECTION 1.263(A)-3(N) CAPITALIZATION ELECTIONTAXPAYER HEREBY ELECTS TO CAPITALIZE REPAIR AND MAINTENANCE COSTS UNDER TREAS. REG. 1.263(A)-3(N). THE COSTS WERE INCURRED DURING THE TAXABLE YEAR IN THE ELECTING TAXPAYER'S TRADE OR BUSINESS AND THE ELECTING TAXPAYER TREATS SUCH COSTS AS CAPITAL EXPENDITURES ON ITS BOOKS AND RECORDS.

**TY 2022 IRS 990 e-File Render****Name:** THE PACKARD HUMANITIES INSTITUTE**EIN:** 94-3038401

Name of Stock	End of Year Book Value	End of Year Fair Market Value
HEWLETT PACKARD CO	15,306,496	15,306,496
EXCHANGE TRADED FUNDS	54,798,423	54,798,423
HEWLETT PACKARD ENTERPRISE	9,091,614	9,091,614
DXC TECHNOLOGY	3,287,060	3,287,060
MICRO FOCUS INTERNATIONAL	1,272,146	1,272,146

## TY 2022 IRS 990 e-File Render

**Name:** THE PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
LIMITED PARTNERSHIPS	FMV	21,681,116	21,681,116
GOLD	FMV	144,247,572	144,247,572
SILVER	FMV	118,632,823	118,632,823

**TY 2022 IRS 990 e-File Render****Name:** THE PACKARD HUMANITIES INSTITUTE**EIN:** 94-3038401

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
OFFICE FURNITURE AND EQUIPMENT	2,732,809	2,646,683	86,126	86,126
COMPUTER HARDWARE/SOFTWARE	566,809	529,105	37,704	37,704
LIBRARY	9,077	9,077	0	
LAND	15,418,800	0	15,418,800	15,418,800
BUILDING	180,203,316	30,863,221	149,340,095	149,340,095

# TY 2022 IRS 990 e-File Render

**Name:** THE PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
GENERAL LEGAL FEES	38,169	1,145	0	40,494

# TY 2022 IRS 990 e-File Render

**Name:** THE PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ASSETS HELD FOR CHARITABLE PURPOSES	8,547,825	8,547,825	8,547,825
ART AND FILM COLLECTIONS	22,064,054	22,486,206	22,486,206

# TY 2022 IRS 990 e-File Render

**Name:** THE PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Description	Amount
UNREALIZED LOSS	9,160,323

**TY 2022 IRS 990 e-File Render****Name:** THE PACKARD HUMANITIES INSTITUTE**EIN:** 94-3038401

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PHOTOCOPYING	1,477	0	0	1,477
INSURANCE	283,171	8,495	0	274,676
COMPUTER EXPENSES	241,079	0	0	240,269
BOOKS & SUBSCRIPTIONS	27,925	0	0	27,925
MISCELLANEOUS EXPENSES	966	0	0	1,070
STORAGE COSTS	53,666	0	0	53,666
MEMBERSHIPS & DUES	4,745	0	0	4,745
ADVERTISING	37,266	0	0	37,706
SUPPLIES & POSTAGE	63,952	0	0	63,974
CONTRACTORS	371,285	0	0	368,572
STAFF DEVELOPMENT	13,355	0	0	13,355
OPERATING EXPENSES	0	0	0	-10,345
PRINTING COST FOR BOOKS	378,712	0	0	367,184
PARTNERSHIP EXPENSES	0	624,029	0	0
EQUIPMENT MAINTENANCE & REPAIRS	3,980	0	0	3,980

# TY 2022 IRS 990 e-File Render

**Name:** THE PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP INCOME	0	31,223	

## TY 2022 IRS 990 e-File Render

**Name:** THE PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED TAXES	1,546,825	1,377,284

**TY 2022 IRS 990 e-File Render****Name:** THE PACKARD HUMANITIES INSTITUTE**EIN:** 94-3038401

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTANTS/RESEARCHERS	1,337,480	0	0	1,359,137
INVESTMENT CUSTODY FEES	521,213	521,213	0	0
MUSIC EDITING	106,594	0	0	106,815
PHOTOGRAPHY	994	0	0	994
TRANSLATING	25,889	0	0	24,621

# TY 2022 IRS 990 e-File Render

**Name:** THE PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CA FILING FEES	1,050	0	0	1,050
MA FILING FEES	610	0	0	610
SALES TAX/PROPERTY TAX	122,237	0	0	122,195
EXCISE TAX	122,514	0	0	0

# TY 2022 IRS 990 e-File Render

**Name:** THE PACKARD HUMANITIES INSTITUTE

**EIN:** 94-3038401

Name	US / Foreign Address	EIN	Description	Amount
ISITUTO PACKARD PER I BENI CULTURALI	VIA PASQUALE PAOLI 25 PISA 56126 IT	000000000	GRANTS	1,420,000
<b>Total</b>				1,420,000