

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 Mental Insight Foundation. A Employer identification number: 94-3256579. B Telephone number: (707) 938-8248. 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. J Accounting method: Cash. Fair market value of all assets at end of year: \$9,311,204.

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
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	519,948	142,387	142,387
	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)	14,542,802	8,277,965	8,277,965
	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)	1,222,139	819,385	819,385
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	36,673	71,467	71,467	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	16,321,562	9,311,204	9,311,204	
Liabilities	17 Accounts payable and accrued expenses	14,926	9,916	
	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 ▶ _____)	1,405,000	250,000	
	23 Total liabilities (add lines 17 through 22).	1,419,926	259,916	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	6,250,000	6,250,000	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds	8,651,636	2,801,288	
29 Total net assets or fund balances (see instructions)	14,901,636	9,051,288		
30 Total liabilities and net assets/fund balances (see instructions)	16,321,562	9,311,204		

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	14,901,636
2 Enter amount from Part I, line 27a	2	-2,993,518
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	11,908,118
5 Decreases not included in line 2 (itemize) ▶ _____	5	2,856,830
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	9,051,288

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 UBS 10236	P	2022-01-01	2022-12-31
b UBS 10236	P	2010-01-01	2022-12-31
c UBS 01171	P	2022-01-01	2022-12-31
d UBS 01171	P	2010-01-01	2022-12-31
e UBS 10234	P	2010-01-01	2022-12-31
UBS 10128	P	2022-01-01	2022-12-31
UBS 10128	P	2010-01-01	2022-12-31
UBS 14446	P	2022-01-01	2022-12-31
UBS 14446	P	2010-01-01	2022-12-31
UBS 10234	P	2022-01-01	2022-12-31
Private Equity Core Fund III Per K-1	P	2022-01-01	2022-01-01
Private Equity Core Fund III Per K-1	P	2001-01-01	2022-01-01
Private Equity Core Fund V Per K-1	P	2022-01-01	2022-01-01
Private Equity Core Fund V Per K-1	P	2001-01-01	2022-01-01
Capital Gain Dividends			

(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 198,808		239,787	-40,979
b 1,129,572		851,018	278,554
c 115,922		132,726	-16,804
d 1,106,537		891,710	214,827
e 2,175,120		2,370,445	-195,325
1,300,408		1,316,105	-15,697
182,520		183,981	-1,461
65,280		70,327	-5,047
409,978		301,337	108,641
662,936		824,836	-161,900
279			279
32,763			32,763
6			6
77,736			77,736
			39,208

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(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	
a			-40,979
b			278,554
c			-16,804
d			214,827
e			-195,325
			-15,697
			-1,461
			-5,047
			108,641
			-161,900
			279
			32,763
			6
			77,736

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	314,801
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	-240,142

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

Table with 11 rows for excise tax calculation. Includes fields for exempt foundations, tax under section 511, credits/payments, and total tax due. Values include 4,940 and 22,272.

Part VI-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, 'Yes', and 'No' responses. Questions cover political activities, unrelated business income, and substantial contributors.

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 N/A
14 The books are in care of Julie Diamond Telephone no. (707) 938-8248 Located at 463 2nd St West Suite E Sonoma CA ZIP+4 95476
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)

5a	During the year did the foundation pay or incur any amount to:		Yes	No
(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 <input type="checkbox"/>			
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? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	5d		
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? If "Yes" to 6b, file Form 8870.	6b		No
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
David Herskovits 43 S Portland Ave Brooklyn, NY 11217	President 1.00	0		
Robert P Bunje 349 Sailfish Isle Foster City, CA 94404	Treasurer 8.00	22,618		
Isabelle Kimpton 101 Cedar Drive 24 Incline Village, NV 89451	Secretary 1.00	0		
Barry Bunshoft 1 Market St 20th Floor San Francisco, CA 94105	Director 8.00	22,618		
Jennifer Catherine Egan 43 South Portland Ave Brooklyn, NY 11217	Director 1.00	0		
Laura Kimpton 218 Linnie Canal Venice, CA 90291	Director 1.00	0		
Kay Kimpton Walker 2620 Jackson San Francisco, CA 94115	Chair-Audit Com 1.00	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.

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
Diamond Philanthropy Advisors 463 2nd St West Suite E Sonoma, C A 95476	Foundation Mgmt.	474,500

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
1 None	0
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	

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	12,215,939
b	Average of monthly cash balances.	1b	324,260
c	Fair market value of all other assets (see instructions).	1c	1,160,044
d	Total (add lines 1a, b, and c).	1d	13,700,243
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	
3	Subtract line 2 from line 1d.	3	13,700,243
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	205,504
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	13,494,739
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	674,737

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	674,737
2a	Tax on investment income for 2022 from Part V, line 5.	2a	4,940
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	4,940
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	669,797
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	669,797
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	669,797

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	4,512,626
b	Program-related investments—total from Part VIII-B	1b	
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	4,512,626

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				669,797
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2022:				
a From 2017.	2,308,975			
b From 2018.	482,907			
c From 2019.	1,504,808			
d From 2020.	2,387,092			
e From 2021.	2,915,294			
f Total of lines 3a through e.	9,599,076			
4 Qualifying distributions for 2022 from Part XI, line 4: ▶ \$ _____ 4,512,626				
a Applied to 2021, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2022 distributable amount				669,797
e Remaining amount distributed out of corpus	3,842,829			
5 Excess distributions carryover applied to 2022. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	13,441,905			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
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				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2021. Subtract line 4a from line 2a. Taxable amount—see instructions.				
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).				
8 Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions)	2,308,975			
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a	11,132,930			
10 Analysis of line 9:				
a Excess from 2018	482,907			
b Excess from 2019	1,504,808			
c Excess from 2020.	2,387,092			
d Excess from 2021	2,915,294			
e Excess from 2022	3,842,829			

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 <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2022	(b) 2021	(c) 2020	(d) 2019	
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 e-mail address of the person to whom applications should be addressed:

Board of Directors
538 Broadway Suite A
Sonoma, CA 95476
(707) 938-8248

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

Written Application

c Any submission deadlines:

None

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

See Statement

Part 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 Hoffman Institute 223 San Anselmo Ste 4 San Anselmo, CA 94901	None	PC	CHARITABLE	50,000
Amazon Watch 1 Haight St Ste B San Francisco, CA 94102	None	PC	charitable	30,000
89 Chambers St New York, NY 10038	None	PC	charitable	50,000
333 Valencia St Suite 320 San Francisco, CA 94103	None	PC	charitable	250,000
300 Broadway Suite 28 San Francisco, CA 94133	None	PC	Charitable	30,000
PO Box 15265 Boston, MA 02215	None	PC	Charitable	35,000
78450 Avenue 41 Bermuda Dunes, CA 92203	None	PC	Charitable	30,000
510A Valley Way Milpitas, CA 95035	None	PC	Charitable	75,000
271 Madison Avenue Suite 907 New York, NY 10016	None	PC	Charitable	100,000
20 Secor Road Ossining, NY 10562	None	PC	Charitable	51,000
145 6th Ave New York, NY 10013	None	PC	Charitable	50,000
3450 3rd St 1C San Francisco, CA 94124	None	PC	Charitable	50,000
PO Box 29144 San Francisco, CA 94129	None	PC	Charitable	50,000
245 Kentucky St Ste D Petaluma, CA 94952	None	PC	Charitable	60,000
18 Hartshorne Dr Suite 2 Highlands, NJ 07732	None	PC	Charitable	30,000
440 Lafayette St 4th Floor New York, NY 10003	None	PC	Charitable	40,000
110 S 2nd St Immokalee, FL 34142	None	PC	Charitable	1,000
100 Newell St Apt 2R Brooklyn, NY 11222	None	PC	Charitable	3,000
315 West 86th St Suite 4E New York, NY 10024	None	PC	Charitable	30,000
115 Mill St Belmont, MA 02478	None	PC	Charitable	50,000
5347 Sterling Center Dr Westlake Village, CA 91361	None	PC	Charitable	3,000
33 51 Street B2 Weehawken, NJ 07086	None	PC	Charitable	1,000
595 Broadway 2nd Fl New York, NY 10012	None	PC	Charitable	50,000
369 Pine St 700 San Francisco, CA 94104	None	PC	Charitable	3,000
93 Mercer St New York, NY 10012	None	PC	Charitable	30,000
151 W 46th Street 8th Fl New York, NY 10036	None	PC	charitable	30,000
5 Gyres Institute 5792 W Jefferson Blvd Los Angeles, CA 90016	None	PC	charitable	3,000
333 Washington Blvd 118 Marina Del Rey, CA 90292	None	PC	charitable	50,000
245 Russell St Ste 22 Hadley, MA 01035	None	PC	charitable	5,000
525 Grand St Brooklyn, NY 11211	None	PC	charitable	100,000
6 Crest Road San Anselmo, CA 94960	None	PC	charitable	30,000
75 Maiden Lane Suite 906 New York, NY 10038	None	PC	charitable	30,000
154 Christopher St Ste 1E New York, NY 10014	None	PC	Charitable	17,500
248 West 35th Street 10th Floor New York, NY 10001	None	PC	Charitable	30,000
PO Box 2154 Palm Harbor, FL 34682	None	PC	Charitable	30,000
148 N Marina Dr Long Beach, CA 90803	None	PC	Charitable	10,000
1176 Park Pacifica Ave Pacifica, CA 94044	None	PC	Charitable	30,000
14460 Falls of Neuse Road Raleigh, NC 27614	None	PC	Charitable	15,000
412 W 42nd St New York, NY 10036	None	PC	Charitable	15,000
4709-1 College Acres Wilmington, NC 28403	None	PC	Charitable	15,000
3520 SE Yamhill St Portland, OR 97214	None	PC	Charitable	50,000
4676 Broadway Street Boulder, CO 80304	None	PC	Charitable	50,000
PO Box 1352 Damariscotta, ME 04543	None	PC	Charitable	30,000
330 Twin Dolphin Drive Ste 131 Redwood City, CA 94065	None	PC	Charitable	15,000
PO Box 1851 Radio City Station New York, NY 10101	None	PC	Charitable	30,000
705 E Bidwell Street Suite 2-415 Folsom, CA 95630	None	PC	Charitable	35,000
8 W 126th St New York, NY 10027	None	PC	Charitable	5,000
306 W 18th St Apt 2b New York, NY 10011	None	PC	Charitable	15,000
3980 N Broadway Ste 103 PMB - 215 Boulder, CO 80304	None	PC	Charitable	50,000
2236 S Barrington Ave Los Angeles, CA 90064	None	PC	Charitable	30,000
228 Park Ave S PMB 98592 New York, NY 10003	None	PC	Charitable	2,000
241 6th Avenue 5A New York, NY 10014	None	PC	Charitable	50,000
1150 Connecticut Avenue NW Ste 800 Washington, DC 20036	None	PC	Charitable	50,000
2400 Bridgeway 210 Sausalito, CA 94965	None	PC	Charitable	15,000
PO Box 206 South Deerfield, MA 01373	None	PC	Charitable	15,000
PO Box 7342 Chicago, IL 60680	None	PC	Charitable	15,000
6 Charterhouse Buildings London EC1M 7ET UK	None	PC	Charitable	25,000
195 41st St 11172 Oakland, CA 94611	None	PC	Charitable	30,000
317 Sutton Pl Santa Rosa, CA 95407	None	PC	Charitable	15,000
26 Broadway 8th Fl New York, NY 10004	None	PC	Charitable	15,000
1611 S Hope St Los Angeles, CA 90015	None	PC	Charitable	50,000
400 W King St 200 Carson City, NV 89703	None	PC	Charitable	15,000
7th Ave 9 New York, NY 10001	None	PC	Charitable	30,000
1446 Market St San Francisco, CA 94102	None	PC	Charitable	15,000
461 Sebastopol Ave Santa Rosa, CA 95401	None	PC	Charitable	50,000
124 Washington Ave Ste B Richmond, CA 94801	None	PC	Charitable	50,000
1228 15th St Santa Monica, CA 90404	None	PC	Charitable	15,000
PO Box 415 Bolinas, CA 94924	None	PC	Charitable	140,000
505 Parnassus Ave San Francisco, CA 94143	None	PC	Charitable	15,000
340 Sunset Ave Venice, CA 90291	None	PC	Charitable	2,000
40 Broad St Ste 602 New York, NY 10004	None	PC	Charitable	15,000
40 NW 3rd St Ste 305 Miami, FL 33128	None	PC	Charitable	50,000
525 E Cotati Ave Cotati, CA 94931	None	PC	Charitable	50,000
4575 E Mesquite Ave Palm Springs, CA 92264	None	PC	Charitable	150,000
101 Brookwood Ave Ste 204 Santa Rosa, CA 95404	None	PC	Charitable	100,000
3141 Stevens Creek Blvd 40563 San Jose, CA 95117	None	PC	Charitable	15,000
171 Bel Marin Keys Blvd Novato, CA 94949	None	PC	Charitable	100,000
73 Buffum St Lynn, MA 01902	None	PC	Charitable	30,000
37 Central Square 2 Lynn, MA 01901	None	PC	Charitable	15,000
1345 Division St 102 Detroit, MI 48207	None	PC	Charitable	75,000
5000 Sir Francis Drake Blvd Woodacre, CA 94973	None	PC	Charitable	100,000
1410 Danzig Plaza Concord, CA 94520	None	PC	Charitable	50,000
5-39 49th Ave Long Island, NY 11101	None	PC	Charitable	50,000
508 2nd St 206 Davis, CA 95616	None	PC	Charitable	2,000
138 S Oxford St Ste 1C Brooklyn, NY 11217	None	PC	Charitable	15,000
2727 E Anaheim St PO Box 4722 Long Beach, CA 90804	None	PC	Charitable	50,000
3106 Clarendon Blvd Ste 800 Arlington, VA 22201	None	PC	Charitable	15,000
63 Flushing Ave Bldg 3 Ste 1105 Brooklyn, NY 11205	None	PC	Charitable	50,000
1275 4th St 191 Santa Rosa, CA 95404	None	PC	Charitable	30,000
80 Audubon St New Haven, CT 06510	None	PC	Charitable	20,000
1102 Monroe St NW Washington, DC 20010	None	PC	Charitable	15,000
1543 Wazee Street Ste 410 Denver, CO 80202	None	PC	Charitable	35,000
353 Hamilton St Albany, NY 12210	None	PC	Charitable	30,000
TP Cooper Bldg 730 Rose St Lexington, KY 40546	None	PC	Charitable	30,000
77 W 127th St New York, NY 10027	None	PC	Charitable	15,000
2720 Alpine Rd Portola Valley, CA 94028	None	PC	Charitable	30,000
1407 Fleet St Baltimore, MD 21231	None	PC	Charitable	30,000
PO Box 559 Lagunitas, CA 94938	None	PC	Charitable	40,000
2323 Broadway Oakland, CA 94612	None	PC	Charitable	1,000
1080 Wyckoff Ave St A06 Queens, NY 11385	None	PC	Charitable	30,000
444 34th St Oakland, CA 94609	None	PC	Charitable	35,000
135 Van Ness Ave San Francisco, CA 94102	None	PC	Charitable	20,000
2400 Bridgeway 220 Sausalito, CA 94965	None	PC	Charitable	35,000
934 Brannan St San Francisco, CA 94103	None	PC	Charitable	5,000
1220 Geer Rd Hughson, CA 95326	None	PC	Charitable	20,000
141 Clove Rd Montague, NJ 07827	None	PC	Charitable	20,000
4333 Brooklyn Ave NE Seattle, WA 98105	None	PC	Charitable	250,000
Total			3a	3,899,500
b Approved for future payment Carbon Cycle Institute 245 Kentucky St Ste D Petaluma, CA 94952	None	PC	Charitable	50,000
Clean Ocean Action Inc 18 Hartshorne Dr Suite 2 Highlands, NJ 07732	None	PC	Charitable	50,000
Kiss The Ground 2236 S Barrington Ave Los Angeles, CA 90064	None	PC	Charitable	50,000
Regeneration Project 369 Pine St 700 San Francisco, CA 94104	None	PC	Charitable	50,000
Upstream Policy Institute Inc PO Box 1352 Damariscotta, ME 04543	None	PC	Charitable	30,000
Total			3b	250,000

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 Private Equity Core Fd. 3
b Private Equity Core Fd. 5
c Wash Sales
d
e

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Includes rows for various income categories and a total row at the bottom.

13 Total. Add line 12, columns (b), (d), and (e). (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.

Additional Data

[Return to Form](#)

Software ID: 22015553

Software Version: 2022v5.0

Form 990PF - Special Condition Description:

Special Condition Description

TY 2022 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 22015553

Software Version: 2022v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	77,704	12,125	0	65,579

TY 2022 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 22015553

Software Version: 2022v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal Fees	1,360	0	0	1,360

TY 2022 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 22015553

Software Version: 2022v5.0

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Tax Refund Receivable	3,002	3,002	3,002
Accrued Security Income	571	9,115	9,115
Prepaid Expense	917	887	887
Prepaid Income Tax	32,183	25,025	25,025
KGH Investment		33,438	33,438

TY 2022 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 22015553

Software Version: 2022v5.0

Description	Amount
NT Private Equity Core Fund III book to tax	119,476
NT Private Equity Core Fund V Book to Tax	199,249
ND Penalties	15
Prior period adjustment - no tax effect	7,158

TY 2022 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 22015553

Software Version: 2022v5.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
NT Private Equity Fund III Deductions	6,641	6,641		
NT Private Equity Fund V Deductions	15,598	15,598		
UBS Management Fees	94,447	94,447		
Foundation Administration	474,500			474,500
Fees and Licenses	202			202
Office Expense	209			209
Insurance	5,557			5,557
Bank Charges	140			140

TY 2022 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 22015553

Software Version: 2022v5.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Wash Sales	19,116	19,116	
Private Equity Core Fd. 5	4,497	-2,812	
Private Equity Core Fd. 3	3,374	873	

TY 2022 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 22015553

Software Version: 2022v5.0

Description	Beginning of Year - Book Value	End of Year - Book Value
Donations Payable	1,405,000	250,000

TY 2022 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 22015553

Software Version: 2022v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Tax	25,000			
State Tax	1,000			
Foreign Taxes	7,210	7,210		