

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

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

Name of foundation: THERESA ALESSANDRA RUSSO FOUNDATION INC. A Employer identification number: 11-3126316. Telephone number: (516) 432-0200. City: LIDO BEACH, NY 11561. Check type of organization: Section 501(c)(3) exempt private foundation. Fair market value: \$3,046,287. Accounting method: Cash.

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. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), leading to Total revenue of 327,208 and Total expenses of 325,486.

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	74,992	36,525	36,525
	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)	2,403,091	2,455,198	2,997,435
	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)			
	14 Land, buildings, and equipment: basis ▶ _____ 61,669 Less: accumulated depreciation (attach schedule) ▶ _____ 49,342	14,049	12,327	12,327
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,492,132	2,504,050	3,046,287	
Liabilities	17 Accounts payable and accrued expenses			
	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 ▶ _____)	0	945	
	23 Total liabilities (add lines 17 through 22).	0	945	
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	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	2,492,132	2,503,105	
29 Total net assets or fund balances (see instructions)	2,492,132	2,503,105		
30 Total liabilities and net assets/fund balances (see instructions)	2,492,132	2,504,050		

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	2,492,132
2 Enter amount from Part I, line 27a	2	25,590
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	2,517,722
5 Decreases not included in line 2 (itemize) ▶ _____	5	14,617
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	2,503,105

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	INV MOD CONSV M/A		2022-03-23	2023-06-30
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 109,861		120,016	-10,155
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			-10,155
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	-10,155
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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		1	1,137
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	1,137
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	1,137
6 Credits/Payments:			
a 2023 estimated tax payments and 2022 overpayment credited to 2023	6a 191		
b Exempt foreign organizations—tax withheld at source	6b 0		
c Tax paid with application for extension of time to file (Form 8868)	6c 1,500		
d Backup withholding erroneously withheld	6d 0		
7 Total credits and payments. Add lines 6a through 6d	7 1,691		
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8 50		
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.	10 504		
11 Enter the amount of line 10 to be: Credited to 2024 estimated tax Refunded	11 0		

Part VI-A Statements Regarding Activities

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?

Table with columns Yes, No and row 1a

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.

Table with columns Yes, No and row 1b

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?

Table with columns Yes, No and row 1c

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. (2) On foundation managers.

Table with columns Yes, No and row 1d

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.

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.

Table with columns Yes, No and row 2

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.

Table with columns Yes, No and row 3

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

Table with columns Yes, No and row 4a

b If "Yes," has it filed a tax return on Form 990-T for this year?

Table with columns Yes, No and row 4b

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.

Table with columns Yes, No and row 5

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?

Table with columns Yes, No and row 6

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.

Table with columns Yes, No and row 7

8a Enter the states to which the foundation reports or with which it is registered (see instructions)

Table with columns Yes, No and row 8a

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.

Table with columns Yes, No and row 8b

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 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII.

Table with columns Yes, No and row 9

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

Table with columns Yes, No and row 10

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.

Table with columns Yes, No and row 11

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.

Table with columns Yes, No and row 12

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address

Table with columns Yes, No and row 13

14 The books are in care of RUSSO LAW GROUP PC Telephone no. (516) 683-1717 Located at 100 QUENTIN ROOSEVELT BLVD STE 102 GARDEN CITY NY 11530 ZIP+4

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.

Table with columns Yes, No and row 14

16 At any time during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country.

Table with columns Yes, No and row 15

Table with columns Yes, No and row 16

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 2023?
- 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 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?
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 2023 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 2023.)
- 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 2023?

	Yes	No
1a(1)		No
1a(2)		No
1a(3)		No
1a(4)		No
1a(5)		No
1a(6)		No
1b		
1d		No
2a		No
2b		
3a		No
3b		
4a		No
4b		No

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:
 - (1)** Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?
 - (2)** Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
 - (3)** Provide a grant to an individual for travel, study, or other similar purposes?
 - (4)** Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions
 - (5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?
- 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
- 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?
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?
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
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?
- b** If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
- 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?

	Yes	No
5a(1)		No
5a(2)		No
5a(3)		No
5a(4)		No
5a(5)		No
5b		
5d		
6a		No
6b		No
7a		No
7b		
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
SUSAN S RUSSO 91 BIARRITZ STREET LIDO BEACH, NY 11561	PRESIDENT 40.00	69,970	0	0
ELIZABETH EINHART 2548 FIFTH AVENUE EAST MEADOW, NY 11554	VICE PRESIDENT 10.00	3,530	0	0
VINCENT J RUSSO 91 BIARRITZ STREET LIDO BEACH, NY 11561	TREASURER 0.00	0	0	0
JUDY MURDAUGH JACKSON 21 ANN DRIVE FREEPORT, NY 11520	SECRETARY 0.00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

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 THE FOUNDATION ACCOMPLISHES ITS CHARITABLE PURPOSES THROUGH A PROGRAM OF MAKING CHARITABLE GIFTS AND GRANTS.THE FOUNDATION DOES NOT CONDUCT ANY DIRECT CHARITABLE	0
2 ACTIVITIES. HENCE, THERE ARE NO EXPENSES IN CONNECTION WITH DIRECT CHARITABLE ACTIVITIES.	0
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	2,798,485
b	Average of monthly cash balances.	1b	41,050
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,839,535
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	2,839,535
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	42,593
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	2,796,942
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	139,847

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	139,847
2a	Tax on investment income for 2022 from Part V, line 5.	2a	1,137
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	1,137
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	138,710
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	138,710
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	138,710

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	325,486
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	325,486

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				138,710
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			0	
b Total for prior years: 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018.				
b From 2019.				
c From 2020.				
d From 2021.				
e From 2022.	245,851			
f Total of lines 3a through e.	245,851			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ <u>325,486</u>				
a Applied to 2022, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2023 distributable amount				138,710
e Remaining amount distributed out of corpus	186,776			
5 Excess distributions carryover applied to 2023. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	432,627			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	432,627			
10 Analysis of line 9:				
a Excess from 2019				
b Excess from 2020				
c Excess from 2021.				
d Excess from 2022	245,851			
e Excess from 2023	186,776			

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)				
a <i>Paid during the year</i> GIGI'S PLAYHOUSE 106 WEST 117TH STREET NEW YORK, NY 10026	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	4,000
HORSEABILITY PO BOX 410-1 OLD WESTBURY, NY 11568	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	10,000
KIDS ENJOY EXERCISE NOW (KEEN) CHICAGO PO BOX 06255 CHICAGO, IL 60606	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
MORGAN'S WONDERLAND 5223 DAVID EDWARDS DRIVE SAN ANTONIO, TX 78233	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
NASSAU PARKS CONSERVANCY 1576 FRONT STREET EAST MEADOW, NY 11594	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	2,000
SPECIAL OLYMPICS OF NEW YORK INC 211 EAST 43RD STREET 802 NEW YORK, NY 10017	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	2,787
ST MARY'S FOUNDATION FOR CHILDREN 29-01 216TH STREET BAYSIDE, NY 11360	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	6,000
WINTERS CENTER FOR AUTISM INC 92 MAHAN STREET WEST BABYLON, NY 11704	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	2,500
JOYCE THEATER FOUNDATION 175 EIGHTH AVENUE NEW YORK, NY 10011	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
NASSAU SUFFOLK AUTISM SOCIETY OF AMERICA PO BOX 7472 WANTAGH, NY 11793	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	6,300
MEPHIBOSHETH FARMS ANGELIC RIDERS INC PO BOX 285 MARSHVILLE, NY 28103	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	10,000
MIDDLE COUNTY LIBRARY FOUNDATION 101 EASTWOOD BLVD CENTEREACH, NY 11720	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	3,250
MISSISSIPPI TOUGHEST KIDS FOUNDATION-CAMP KAMASSA PO BOX 520 CRYSTAL SPRINGS, MS 39059	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	20,000
SALT LAKE COMMUNITY COLLEGE FOUNDATION 4600 SOUTH REDWOOD ROAD SALT LAKE CITY, UT 84123	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
	NONE/NON-PROFIT		TO FUND VARIOUS	10,000

TILES CENTER FOR THE PERFORMING ARTS 720 NORTHERN BLVD BROOKVILLE,NY 11548			PROGRAMS	
CAMP KNUTSON 11148 MANHATTA POINT BLVD CROSSLAKE,MN 56442	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
SPIRIT OF HUNTINGTON ART CENTER 2 MELVILLE ROAD NORTH HUNTINGTON STATION,NY 11746	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
BACKYARD PLAYERS AND FRIENDS 215 NORTH LONG BEACH ROAD ROCKVILLE CENTRE,NY 11570	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
SOUTHAMPTON FRESH AIR FUND 36 BERKERS ISLAND ROAD SOUTHAMPTON,NY 11968	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	2,500
NASSAN COUNTY MUSEUM OF ART ONE MUSEUM DRIVE ROSLYN HARBOR,NY 11576	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	6,169
BRING ON THE SPECTRUM INC 71 FULLER ROAD SUITE 6 ALBANY,NY 12205	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,450
KTS KIDS 1930 WEST BRADLEY PLACE CHICAGO,IL 60613	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
INVICTUS ENTERPRISES FOUNDATION 456 BERGEN STREET BROOKLYN,NY 11217	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	4,000
FEEL THE BEAT CORPORATION 3330 SOUTH BROADWAY SUITE 452 ENGLEWOOD,C O 80113	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
SHEPARDSON ELEMENTARY SCHOOL 1501 SPRINGWOOD DRIVE ROOM 108 FORT COLLINS,C O 80521	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	5,000
THE ACTING OUT PLAYHOUSE 11 HAMILTON AVE WARWICK,NY 10990	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	275
HUDSON VALLEY SWIM 15 RACQUET ROAD 2 NEWBURGH,NY 12553	NONE/NON-PROFIT		TO FUND VARIOUS PROGRAMS	630
Total			▶ 3a	145,861

b *Approved for future payment*

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Total ▶ **3b**

0

Additional Data

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Form 990PF - Special Condition Description:

Special Condition Description

Schedule B

Schedule of Contributors

OMB No. 1545-0047

2023

(Form 990)
Department of the Treasury
Internal Revenue Service

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

Name of the organization THERESA ALESSANDRA RUSSO FOUNDATION INC	Employer identification number 11-3126316
------------------------------------------------------------------------	----------------------------------------------

Organization type (check one):

- Filers of:** **Section:**
- Form 990 or 990-EZ 501(c)() (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization
- Form 990-PF 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
 THERESA ALESSANDRA RUSSO
 FOUNDATION INC

Employer identification number
 11-3126316

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	THERESA POOLED TRUST-THE CENTER FOR SPECIAL NEEDS-4912 CREEKSIDE DRIVE CLEARWATER, FL 33760	\$ 141,760	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
2	DAVID HUNGERFORD 395 NORTH SERVICE ROAD SUITE 206 MELVILLE, NY 11747	\$ 5,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
3	CONTRIBUTIONS RECEIVED LESS THAN 50 250 LIDO BOULEVARD LIDO BEACH, NY 11561	\$ 114,312	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
4	ANTHONY AND LORI DIBARNABA 1170 GULF BOULEVARD UNIT 1201 CLEARWATER, FL 33767	\$ 20,082	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization
THERESA ALESSANDRA RUSSO
FOUNDATION INC

Employer identification number
11-3126316

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
4	283 SHARES SCHWAB S&P 500 INDEX	\$ 20,082	2024-11-15
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____

Name of organization THERESA ALESSANDRA RUSSO FOUNDATION INC	Employer identification number 11-3126316
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____

Use duplicate copies of Part III if additional space is needed.

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

Additional Data

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Software ID:

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Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2023 IRS 990 e-File Render

Name: THERESA ALESSANDRA RUSSO

FOUNDATION INC

EIN: 11-3126316

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
EQUIPMENT	1996-06-03	1,903	1,903	200DB	5.000000000000	0	0	0	
LEASEHOLD IMPROVEMENTS	2009-01-01	5,100	4,612	150DB	15.000000000000	325	0	0	
LEASEHOLD IMPROVEMENTS	2020-01-01	33,641	27,887	150DB	15.000000000000	575	0	0	
FURNITURE & FIXTURES	2011-03-04	2,215	2,215	200DB	7.000000000000	0	0	0	
EQUIPMENT	2013-05-31	670	670	200DB	5.000000000000	0	0	0	
EQUIPMENT	2014-07-15	1,015	1,015	200DB	5.000000000000	0	0	0	
EQUIPMENT	2016-03-13	3,205	3,205	200DB	5.000000000000	0	0	0	
LEASEHOLD IMPROVEMENTS	2017-08-01	13,920	6,113	150DB	15.000000000000	822	0	0	

TY 2023 IRS 990 e-File Render

Name: THERESA ALESSANDRA RUSSO
FOUNDATION INC

EIN: 11-3126316

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EQUITABLE ADVISORS	2,455,198	2,997,435

TY 2023 IRS 990 e-File Render

Name: THERESA ALESSANDRA RUSSO
FOUNDATION INC

EIN: 11-3126316

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
EQUIPMENT	1,903	1,903	0	0
LEASEHOLD IMPROVEMENTS	5,100	4,937	163	163
LEASEHOLD IMPROVEMENTS	33,641	28,462	5,179	5,179
FURNITURE & FIXTURES	2,215	2,215	0	0
EQUIPMENT	670	670	0	0
EQUIPMENT	1,015	1,015	0	0
EQUIPMENT	3,205	3,205	0	0
LEASEHOLD IMPROVEMENTS	13,920	6,935	6,985	6,985

TY 2023 IRS 990 e-File Render

Name: THERESA ALESSANDRA RUSSO
FOUNDATION INC

EIN: 11-3126316

Description	Amount
ADJUSTMENT OF CONTRIBUTION FAIR MARKET VALUE TO COST	14,617

TY 2023 IRS 990 e-File Render

Name: THERESA ALESSANDRA RUSSO
FOUNDATION INC

EIN: 11-3126316

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROMOTIONAL	21,756	0	0	21,756
GOLF OUTING EXPENSE	46,590	0	0	46,590
INSURANCE	764	0	0	764
SUPPLIES & OFFICE EXPENSE	4,893	0	0	4,893
NEW YORK STATE FILING FEES	275	0	0	275

TY 2023 IRS 990 e-File Render

Name: THERESA ALESSANDRA RUSSO
FOUNDATION INC

EIN: 11-3126316

Description	Beginning of Year - Book Value	End of Year - Book Value
CREDIT CARD PAYABLE	0	945

TY 2023 IRS 990 e-File Render

Name: THERESA ALESSANDRA RUSSO
FOUNDATION INC

EIN: 11-3126316

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL FEES	19,772	0	0	19,772