

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

Name of foundation HEINZ FAMILY FOUNDATION		A Employer identification number 25-1689382	
Number and street (or P.O. box number if mail is not delivered to street address) 625 LIBERTY AVENUE 3200		Room/suite	B Telephone number (see instructions) (412) 497-5775
City or town, state or province, country, and ZIP or foreign postal code PITTSBURGH, PA 15222		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ <u>125,099,864</u>		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	861,758	2,020,906		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,939,420			
	b Gross sales price for all assets on line 6a <u>9,360,147</u>				
	7 Capital gain net income (from Part IV, line 2)		530,615		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	837	60,375		
	12 Total. Add lines 1 through 11	2,802,015	2,611,896		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	14,370	719		13,651
	b Accounting fees (attach schedule)	30,094	1,387		26,344
	c Other professional fees (attach schedule)	605,404	607,877		0
	17 Interest		116,624		
	18 Taxes (attach schedule) (see instructions)	8,122	63,692		0
	19 Depreciation (attach schedule) and depletion	6,304	315		
	20 Occupancy				
	21 Travel, conferences, and meetings	24,315	1,216		23,099
	22 Printing and publications	1,084	54		1,030
	23 Other expenses (attach schedule)	1,956,843	339,942		1,954,589
	24 Total operating and administrative expenses. Add lines 13 through 23	2,646,536	1,131,826		2,018,713
	25 Contributions, gifts, grants paid	4,479,500			4,739,500
	26 Total expenses and disbursements. Add lines 24 and 25	7,126,036	1,131,826		6,758,213
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-4,324,021			
	b Net investment income (if negative, enter -0-)		1,480,070		
	c Adjusted net income (if negative, enter -0-)				

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		26,771	61,502	61,502
	2	Savings and temporary cash investments		1,254,525	6,581,658	6,581,658
	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)		27,583,319	28,533,319	28,253,837
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment: basis ▶ _____ 1,599,254 Less: accumulated depreciation (attach schedule) ▶ _____ 1,596,344		9,214	2,910	2,910
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)		49,377,190	40,400,900	48,859,135
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)		36,981,470	35,186,968	41,340,822	
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		115,232,489	110,767,257	125,099,864	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable		175,000	225,000	
	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 ▶ _____)		4,658,737	4,517,526	
	23	Total liabilities (add lines 17 through 22).		4,833,737	4,742,526	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions		32,361,618	30,933,650	
	25	Net assets with donor restrictions		78,037,134	75,091,081	
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds				
	29	Total net assets or fund balances (see instructions)		110,398,752	106,024,731	
	30	Total liabilities and net assets/fund balances (see instructions) .		115,232,489	110,767,257	

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)	1 110,398,752
2	Enter amount from Part I, line 27a	2 -4,324,021
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 106,074,731
5	Decreases not included in line 2 (itemize) ▶ _____	5 50,000
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6 106,024,731

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 8,876,237		8,818,718	57,519
b 483,910			483,910
c		10,814	-10,814
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			57,519
b			483,910
c			-10,814
d			
e			

2 Capital gain net income or (net capital loss)

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

If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7

2

3

530,615

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.		
	Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)	1	20,573
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	20,573
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	20,573
6	Credits/Payments:		
a	2023 estimated tax payments and 2022 overpayment credited to 2023	6a	80,508
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	80,508
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	10	59,935
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?		Yes	No
1a				No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.			No
	<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ <u>0</u> (2) On foundation managers. ▶ \$ <u>0</u>			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ <u>0</u>			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ PA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," attach schedule. See instructions.</i>	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i>	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ MICHELE M BATTLE Telephone no. ▶ (412) 497-5775 Located at ▶ 625 LIBERTY AVENUE SUITE 3200 PITTSBURGH PA ZIP+4 ▶ 15222			
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 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. <i>If "Yes", enter the name of the foreign country</i> ▶	16	Yes	No
				No

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)	No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)	No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)	No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)	No
b If any answer is "Yes" to 1a(1)–(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	No
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?	1d	No
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 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____	2a	No
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  20____, 20____, 20____, 20____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	No
b If "Yes," did it have excess business holdings in 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.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2023?	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)

Yes

5a(4)

No

5a(5)

No

5b

No

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
MCCALL CRAVENS	CHIEF INVESTMENT OFFICER	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	8.00			
MICHELE BATTLE	TREASURER	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	4.00			
WENDY MACKENZIE	SECRETARY AND TERM DIRECTOR	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	1.00			
TERESA HEINZ	CHAIR/CEO	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	2.00			
ANDRE HEINZ	CLASS B PERMANENT DIRECTOR	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	1.00			
CHRISTOPHER HEINZ	CLASS B PERMANENT DIRECTOR	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	1.00			
RONALD DAVENPORT	TERM DIRECTOR	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	1.00			
ARIE KOPELMAN	TERM DIRECTOR	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	1.00			
LINDA K SMITH ESQ	TERM DIRECTOR	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	1.00			
THEODORE H STEBBINS JR	TERM DIRECTOR	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	1.00			
ALISON BYERS	TERM DIRECTOR	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	1.00			
ELISSA BROWN	TERM DIRECTOR	0	0	0
625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	1.00			

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
HEINZ FAMILY OFFICE 625 LIBERTY AVENUE SUITE 3200 PITTSBURGH,PA 15222	PERSONAL SERVICES AGREEMENT	1,536,624
BURNESS COMMUNICATIONS 7910 WOODMONT AVENUE SUITE 700 BETHESDA,MD 208147034		
	HEINZ AWARDS PUBLIC RELATIONS CONSULTING	140,265

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 ONE OF THE PRIMARY EXEMPT PURPOSES OF THE FOUNDATION IS THE AWARDING OF INDIVIDUAL GRANTS, RECOGNIZING OUTSTANDING ACHIEVEMENTS IN THE AREAS OF THE ARTS, ECONOMY, AND ENVIRONMENT. DURING 2023, SIX GRANTS WERE MADE TO INDIVIDUALS OR CHARITABLE ORGANIZATIONS AS DETAILED ON PART XIV.THESE AWARDS ARE GRANTED IN ACCORDANCE WITH IRC SECTION 4945 (G) ON AN OBJECTIVE AND NONDISCRIMINATORY BASIS PURSUANT TO A PROCEDURE APPROVED IN ADVANCE BY THE INTERNAL REVENUE SERVICE.	2,464,125
2	
3	
4	

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

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

Part IX

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	26,061,236
b	Average of monthly cash balances.	1b	4,589,086
c	Fair market value of all other assets (see instructions).	1c	89,987,483
d	Total (add lines 1a, b, and c).	1d	120,637,805
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	120,637,805
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	1,809,567
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	118,828,238
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	5,941,412

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	5,941,412
2a	Tax on investment income for 2022 from Part V, line 5.	2a	20,573
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	5,774
c	Add lines 2a and 2b.	2c	26,347
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	5,915,065
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	5,915,065
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	5,915,065

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	6,758,213
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	6,758,213

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					5,915,065
2 Undistributed income, if any, as of the end of 2022:					
a Enter amount for 2022 only.				4,954,245	
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.					
f Total of lines 3a through e.		0			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ 6,758,213					
a Applied to 2022, but not more than line 2a				4,954,245	
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					1,803,968
e Remaining amount distributed out of corpus		0			
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		0			
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					4,111,097
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		0			
10 Analysis of line 9:					
a Excess from 2019					
b Excess from 2020					
c Excess from 2021.					
d Excess from 2022					
e Excess from 2023					

Part 7

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> COLETTE PICHON BATTLE 625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	N/A	I	2023 HEINZ AWARD WINNER - ENVIRONMENT	250,000
KATHRYN FINNEY 625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	N/A	I	2023 HEINZ AWARD WINNER - ECONOMY	250,000
KEVIN BEASLEY 625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	N/A	I	2023 HEINZ AWARD WINNER - ARTS	250,000
NICOLE HORSEHERDER 625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	N/A	I	2023 HEINZ AWARD WINNER - ENVIRONMENT	250,000
ROBERTO LUGO 625 LIBERTY AVENUE SUITE 3200 PITTSBURGH, PA 15222	N/A	I	2023 HEINZ AWARD WINNER - ARTS	250,000
SOUL FIRE FARM INSTITUTE 1972 NY-2 PETERSBURG, NY 12138	N/A	P C	DESIGNATED PAYMENT BY LEAH PENNIMAN, 2023 HEINZ AWARD WINNER - ECONOMY	250,000
PHILLIPS EXETER ACADEMY 20 MAIN STREET EXETER, NH 038332460	N/A	P C	SCHOLARSHIPS FOR THE 2023-24 ACADEMIC YEAR	58,000
YALE UNIVERSITY PO BOX 2038 NEW HAVEN, CT 06521	N/A	P C	UNDERGRADUATE SCHOLARSHIPS FOR THE 2023-24 ACADEMIC YEAR	202,000
AARK WILDLIFE REHABILITATION AND EDUCATION CENTER 1531 UPPER STUMP ROAD CHALFONT, PA 18914	N/A	P C	FOR GENERAL OPERATING SUPPORT	5,000
THE ADVOCATES FOR SURVIVORS OF DOMESTIC VIOLENCE 211 SOUTH RIVER STREET PO BOX 3216 HAILEY, ID 83333	N/A	P C	FOR GENERAL OPERATING SUPPORT	2,500
AMERICAN ACADEMY OF ARTS AND SCIENCES 136 IRVING STREET CAMBRIDGE, MA 02138	N/A	P C	FOR THE ANNUAL FUND	5,000
AMERICAN CIVIL LIBERTIES UNION FOUNDATION 125 BROAD STREET 18TH FLOOR NEW YORK, NY 10004	N/A	P C	FOR GENERAL OPERATING SUPPORT	10,000
ARTS FOR THE AGING INC 15800 CRABBS BRANCH WAY SUITE 300 ROCKVILLE, MD 20855	N/A	P C	FOR GENERAL OPERATING SUPPORT	15,000
ASSOCIATION FOR RESCUE AT SEA 125 BROAD STREET 18TH FLOOR FISH CREEK, WI 54212	N/A	P C	FOR THE ICELANDIC ASSOCIATION FOR SEARCH AND RESCUE	10,000
BALD MOUNTAIN RESCUE FUND PO BOX 370 KETCHUM, ID 83340	N/A	P C	FOR SUPPORT IN HONOR OF VINCE BAERTSCHI	25,000
BALD MOUNTAIN RESCUE FUND PO BOX 370 KETCHUM, ID 83340	N/A	P C	FOR SUPPORT IN HONOR OF VINCE BAERTSCHI	25,000
THE BARACK OBAMA FOUNDATION PO BOX 779056 CHICAGO, IL 60677	N/A	P C	FOR GENERAL OPERATING SUPPORT	250,000
BLAINE COUNTY HUNGER COALITION INC 110 HONEYSUCKLE STREET BELLEVUE, ID 83313	N/A	P C	FOR GENERAL OPERATING SUPPORT	2,500
BLAINE COUNTY RECREATION DISTRICT 1050 FOX ACRES ROAD 107 HAILEY, ID 83333	N/A	GOV	FOR THE GALENA LODGE	50,000
BLAINE COUNTY RECREATION DISTRICT 1050 FOX ACRES ROAD 107 HAILEY, ID 83333	N/A	GOV	FOR THE GALENA LODGE	50,000
THE BREAST CANCER RESEARCH FOUNDATION INC 28 WEST 44TH STREET SUITE 609 NEW YORK, NY 10036	N/A	P C	FOR THE BOSTON HOT PINK PARTY	10,000
BRIGID ALLIANCE PO BOX 58 NEW YORK, NY 10024	N/A	P C	FOR GENERAL OPERATING SUPPORT	25,000
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVENUE NW WASHINGTON, DC 20036	N/A	P C	FOR GENERAL OPERATING SUPPORT	25,000
CARNEGIE INSTITUTE 4400 FORBES AVENUE PITTSBURGH, PA 15213	N/A	P C	FOR THE 2023 ANNUAL GIVING CAMPAIGN	25,000
CARNEGIE INSTITUTE MUSEUM OF ART 4400 FORBES AVENUE PITTSBURGH, PA 15213	N/A	P C	FOR THE FELLOWS FUND	5,000
CARNEGIE MELLON UNIVERSITY 5000 FORBES AVENUE PITTSBURGH, PA 15213	N/A	P C	FOR THE TRUSTEE ANNUAL FUND	25,000
CATHOLIC YOUTH ASSOCIATION OF PITTSBURGH INC 286 MAIN STREET PITTSBURGH, PA 15201	N/A	P C	FOR THE 50TH ANNUAL ART ROONEY AWARD DINNER AND AUCTION	2,000
CENTER FOR NEW AMERICAN SECURITY INC 1152 15TH STREET NW SUITE 950 WASHINGTON, DC 20005	N/A	P C	FOR THE CAPITAL CAMPAIGN	125,000
CHURCH BY THE SEA 2700 MAYAN DRIVE FT LAUDERDALE, FL 33316	N/A	P C	FOR THE NORTHERN ABACOS RELIEF AND REBUILD FUND	25,000
CLEAR THOUGHTS FOUNDATION 3000 VILLAGE RUN ROAD UNIT 103 225 PITTSBURGH, PA 15090	N/A	P C	FOR THE 2023 ROLL FOR A REASON GALA	15,000
COMMUNITY FOUNDATION OF GREATER JOHNSTOWN 216 FRANKLIN ST SUITE 400 JOHNSTOWN, PA 15901	N/A	P C	FOR THE PITTSBURGH CLIMATE FUNDERS CONFERENCE	30,000
COMMUNITY LIBRARY ASSOCIATION INC KETCHUM SUN VALLEY & TRIUMPH 415 SPRUCE AVENUE N PO BOX 2168 KETCHUM, ID 83340	N/A	P C	FOR GENERAL OPERATING SUPPORT	25,000
COMMUNITY LIBRARY ASSOCIATION INC KETCHUM SUN VALLEY & TRIUMPH 415 SPRUCE AVENUE N PO BOX 2168 KETCHUM, ID 83340	N/A	P C	FOR SUPPORT OF THE LIBRARIES PROGRAMMING AND CORE COLLECTIONS FOR THE CHILDRENS LIBRARY	25,000
COUNCIL ON FOREIGN RELATIONS 58 EAST 68TH STREET NEW YORK, NY 10065	N/A	P C	FOR THE ANNUAL FUND	10,000
DOCTORS WITHOUT BORDERS USA 40 RECTOR STREET 16TH FLOOR NEW YORK, NY 10006	N/A	P C	FOR GENERAL OPERATING SUPPORT	50,000
EAST SIDE HOUSE SETTLEMENT 337 ALEXANDER AVENUE BROXN, NY 10454	N/A	P C	FOR THE WINTER ANTIQUES SHOW	2,500
ENGAGE NEPAL 5022 GRAND BEECH CT HAYMARKET, VA 20169	N/A	P C	FOR GENERAL OPERATING SUPPORT	125,000
FLOURISH FOUNDATION PO BOX 2429 KETCHUM, ID 83340	N/A	P C	FOR GENERAL OPERATING SUPPORT	10,000
THE FRED ROGERS COMPANY 424 S 27TH STREET SUITE 301 PITTSBURGH, PA 15203	N/A	P C	FOR ALMA'S WAY	100,000
FUND FOR PARKS AND RECREATION IN BOSTON 1010 MASSACHUSETTS AVENUE 3RD FLOOR BOSTON, MA 02118	N/A	P C	FOR THE BOSTON COMMON HOLIDAY DISPLAY CAMPAIGN	2,500
GLOBAL LINKS 700 TRUMBULL DRIVE PITTSBURGH, PA 15205	N/A	P C	FOR THE DOMESTIC MEDICAL AID COMMUNITY PARTNERS PROGRAM	15,000
HARLEM CHILDREN'S ZONE 35 EAST 125TH STREET 6TH FLOOR NEW YORK, NY 10035	N/A	P C	FOR THE ANNUAL BENEFIT DINNER HONORING SAM REEVES	5,000
HEARTH INC 1640 WASHINGTON STREET BOSTON, MA 02118	N/A	P C	FOR GENERAL OPERATING SUPPORT	5,000
HIGHER GROUND SUN VALLEY INC P O BOX 6791 160 7TH STREET W KETCHUM, ID 83340	N/A	P C	FOR GENERAL OPERATING SUPPORT	15,000
HOLT-ELWELL MEMORIAL FOUNDATION PO BOX 9 HEBRON, NH 03241	N/A	P C	FOR CAMP MOWGLIS	2,500
HOLT-ELWELL MEMORIAL FOUNDATION PO BOX 9 HEBRON, NH 03241	N/A	P C	FOR THE CAMP MOWGLIS SCHOLARSHIP ENDOWMENT FUND	29,000
IDAHO CONSERVATION LEAGUE PO BOX 844 BOISE, ID 83701	N/A	P C	FOR THE WILDLIFE PROGRAM	30,000
INTERNATIONAL DOCUMENTARY ASSOCIATION 3600 WILSHIRE BLVD SUITE 1810 LOS ANGELES, CA 90010	N/A	P C	FOR THE MEDIHA FILM (ID: 5146)	5,000
JEWISH HEALTHCARE FOUNDATION OF PITTSBURGH 625 LIBERTY AVENUE SUITE 2500 PITTSBURGH, PA 15222	N/A	P C	FOR THE WOMEN AS THEY AGE: ADDRESSING THE NEXT INEQUITY FRONTIER PROGRAM	15,000
KHAN ACADEMY INC PO BOX 1630 MOUNTAIN VIEW, CA 94042	N/A	P C	FOR THE KHANMINGO AI POWERED TUTOR PROGRAM	125,000
LAST CHANCE RANCH 9 BECK ROAD QUAKERTOWN, PA 18951	N/A	P C	FOR GENERAL OPERATING SUPPORT	5,000
LIVING WITH WOLVES LTD PO BOX 896 SUN VALLEY, ID 83353	N/A	P C	FOR GENERAL OPERATING SUPPORT	5,000
MASSACHUSETTS GENERAL HOSPITAL 125 NASHUA STREET SUITE 540 BOSTON, MA 02114	N/A	P C	FOR THE LYMPHEDEMA IN WOMEN WITH BREAST CANCER STUDY	330,000
MULE DEER FOUNDATION PO BOX 1688 HAILEY, ID 83333	N/A	P C	FOR THE WOOD RIVER CHAPTER	5,000
MULTIPLYING GOOD INC 348 WEST 57TH STREET SUITE 115 NEW YORK, NY 10019	N/A	P C	FOR THE 51ST ANNUAL JEFFERSON AWARDS	25,000
NANTUCKET CONSERVATION FOUNDATION INC PO BOX 13 NANTUCKET, MA 02554	N/A	P C	FOR GENERAL OPERATING SUPPORT	1,500
NANTUCKET HISTORICAL ASSOCIATION PO BOX 1016 NANTUCKET, MA 02554	N/A	P C	FOR GENERAL OPERATING SUPPORT	1,000
NATIONAL DANCE INSTITUTE INC 217 WEST 147TH STREET NEW YORK, NY 10039	N/A	P C	FOR THE 2023 ANNUAL GALA	25,000
NATIONAL FOREST FOUNDATION BLDG 27 SUITE 3 FORT MISSOULA ROAD MISSOULA, MT 59804	N/A	P C	FOR THE SAWTOOTH FOREST RIVERS TO PEAKS TREASURED LANDSCAPE SITE	50,000
NATIONAL GALLERY OF ART 6TH CONSTITUTION WASHINGTON, DC 20565	N/A	P C	FOR THE ANNUAL CIRCLE FUND	10,000
NATIONAL LINKS TRUST 331 7TH STREET NE WASHINGTON, DC 20002	N/A	P C	FOR THE JACK VARDAMAN WORKFORCE DEVELOPMENT PROGRAM	50,000
NATURAL RESOURCES DEFENSE COUNCIL INC 40 WEST 20TH STREET 11TH FLOOR NEW YORK, NY 10011	N/A	P C	FOR GENERAL OPERATING SUPPORT	10,000
NAVY SEAL FOUNDATION INC 1619 D STREET VIRGINIA BEACH, VA 23459	N/A	P C	FOR THE MARCH 2024 NEW YORK CITY EVENT	25,000
NAVY SEAL FOUNDATION INC 1619 D STREET VIRGINIA BEACH, VA 23459	N/A	P C	FOR THE MARCH 2024 NEW YORK CITY EVENT	25,000
NEW YORK RESTORATION PROJECT 254 WEST 31ST STREET 10TH FLOOR NEW YORK, NY 10001	N/A	P C	FOR THE ANNUAL HULAWEEN EVENT	5,000
PLANNED PARENTHOOD FEDERATION OF AMERICA PO BOX 97166 WASHINGTON, DC 20090	N/A	P C	FOR GENERAL OPERATING SUPPORT	10,000
PLANNED PARENTHOOD FEDERATION OF AMERICA PO BOX 97166 WASHINGTON, DC 20090	N/A	P C	FOR THE ACTION FUND	25,000
PLANNED PARENTHOOD KEYSTONE 610 LOUIS DRIVE SUITE 300 WARMINGSTER, PA 18974	N/A	P C	FOR GENERAL OPERATING SUPPORT	25,000
PRESIDENT AND FELLOWS OF HARVARD COLLEGE PO BOX 415649 BOSTON, MA 02241	N/A	P C	FOR THE MBA CLASS OF 2001 NATIONAL DEFENSE FELLOWSHIP	10,000
REPRESENT US EDUCATION FUND PO BOX 60008 FLORENCE, MA 01062	N/A	P C	FOR GENERAL OPERATING SUPPORT	50,000
RODALE INSTITUTE 611 SIEGFRIE DALE ROAD KUTZTOWN, PA 19530	N/A	P C	FOR GENERAL OPERATING SUPPORT	25,000
ROLLING HARVEST FOOD RESCUE PO BOX 693 NEW HOPE, PA 18938	N/A	P C	FOR GENERAL OPERATING SUPPORT	5,000
ROSIE'S PLACE 889 HARRISON AVENUE BOSTON, MA 02118	N/A	P C	FOR THE "FUNNY WOMEN... SERIOUS BUSINESS" EVENT	5,000
SEED GLOBAL HEALTH 20 ASHBURTON PLACE 6TH FLOOR BOSTON, MA 02108	N/A	P C	FOR GENERAL OPERATING SUPPORT	25,000
SEVERN SCHOOL 116 MAPLE AVENUE SEVERNA PARK, MD 21146	N/A	P C	FOR THE VAN ENY 09 FELLOWS PROGRAM	25,000
SILENT SPRING INSTITUTE 320 NEVADA STREET SUITE 320 NEWTON, MA 02460	N/A	P C	FOR THE ANNUAL GALA	25,000
SIMMONS UNIVERSITY 300 THE FENWAY BOSTON, MA 02115	N/A	P C	FOR THE NUTRITION DEPARTMENT	25,000
SMALL FRIENDS ON NANTUCKET INC PO BOX 2826 NANTUCKET, MA 02584	N/A	P C	FOR GENERAL OPERATING SUPPORT	500
ST PAUL'S SCHOOL 325 PLEASANT STREET CONCORD, NH 03301	N/A	P C	FOR THE PARENTS ANNUAL FUND	5,000
ST THOMAS EPISCOPAL CHURCH PO BOX 1070 SUN VALLEY, ID 83353	N/A	P C	FOR GENERAL OPERATING SUPPORT	20,000
STORYMAKERS NYC INC 61 GRAMERCY PARK N 7TH FLOOR NEW YORK CITY, NY 10010	N/A	P C	FOR STORYMAKERS NYC	12,500
SUN VALLEY COMMUNITY SCHOOL INC PO BOX 2118 SUN VALLEY, ID 83353	N/A	P C	FOR THE 50TH ANNIVERSARY	50,000
SUN VALLEY INSTITUTE FOR RESILIENCE INC PO BOX 3537 HAILEY, ID 83333	N/A	P C	FOR THE IMPACT IDAHO FUND	50,000
SUN VALLEY MUSEUM OF ART PO BOX 656 SUN VALLEY, ID 83353	N/A	P C	FOR THE SUN VALLEY WINE AUCTION	10,000
SUN VALLEY MUSIC FESTIVAL PO BOX 1914 SUN VALLEY, ID 83353	N/A	P C	FOR THE 2023 ASSOCIATE CONDUCTOR POSITION	30,000
SUN VALLEY MUSIC FESTIVAL PO BOX 1914 SUN VALLEY, ID 83353	N/A	P C	FOR GENERAL OPERATING SUPPORT	30,000
SUN VALLEY MUSIC FESTIVAL PO BOX 1914 SUN VALLEY, ID 83353	N/A	P C	FOR THE 2024 ASSOCIATE CONDUCTOR POSITION	30,000
SUN VALLEY SKI EDUCATION FOUNDATION PO BOX 203 SUN VALLEY, ID 83353	N/A	P C	FOR ALPINE RESTRICTED (HALEY CUTLER)	5,000
SUN VALLEY SKI EDUCATION FOUNDATION PO BOX 203 SUN VALLEY, ID 83353	N/A	P C	FOR THE ROTARUN AFTERSCHOOL PROGRAMMING FOR DISADVANTAGED KIDS	35,000
SUN VALLEY SKI EDUCATION FOUNDATION PO BOX 203 SUN VALLEY, ID 83353	N/A	P C	FOR THE ROTARUN SNOWGUN CAPITAL CAMPAIGN	28,000
SUN VALLEY SKI EDUCATION FOUNDATION PO BOX 203 SUN VALLEY, ID 83353	N/A	P C	FOR ALPINE RESTRICTED (HALEY CUTLER)	5,000
SUN VALLEY SKI EDUCATION FOUNDATION PO BOX 203 SUN VALLEY, ID 83353	N/A	P C	FOR THE ROTARUN SKI AREA	50,000
SUN VALLEY WRITERS' CONFERENCE P O BOX 957 KETCHUM, ID 83340	N/A	P C	FOR THE 2024 WRITERS' CONFERENCE	20,000
TED FOUNDATION INC 330 HUDSON STREET FLOOR 11 NEW YORK, NY 10013	N/A	P OF	FOR THE TED FELLOWS PROGRAM	50,000
THORN 222 PACIFIC COAST HIGHWAY 10TH FLOOR EL SEGUNDO, CA 90245	N/A	P C	FOR GENERAL OPERATING SUPPORT	20,000
THRESHOLD DANCE PROJECT 400 WEST 43RD STREET SUITE 43E NEW YORK, NY 10036	N/A	P C	FOR THE ANNUAL TABLE OF SILENCE PROJECT 9/11	15,000
TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA 1 COLLEGE HALL ROOM 100 PHILADELPHIA, PA 191046380	N/A	P C	FOR SUPPORT OF THE RESEARCH OF DR. JAMES PAWELSKI	100,000
TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA 1 COLLEGE HALL ROOM 100 PHILADELPHIA, PA 191046380	N/A	P C	FOR THE POSITIVE PSYCHOLOGY CENTER TO SUPPORT ACTIVITIES RELATED TO THE ADVANCEMENT OF POSITIVE PSYCHOLOGY	25,000
UNITE FOR HER 127 EAST CHESTNUT STREET WEST CHESTER, PA 19380	N/A	P C	FOR GENERAL OPERATING SUPPORT	5,000
UNITED STATES SKI ASSOCIATION PO BOX 100 PARK CITY, UT 84060	N/A	P C	FOR GENERAL OPERATING SUPPORT	5,000
UNITED STATES SKI ASSOCIATION PO BOX 100 PARK CITY, UT 84060	N/A	P C	FOR GENERAL OPERATING SUPPORT	50,000
UNIVERSITY OF MINNESOTA FOUNDATION 200 OAK STREET SE SUITE 500 MINNEAPOLIS, MN 55455	N/A	P C	FOR THE RURAL HEALTH RESEARCH CENTER	50,000
WOODLEY HOUSE INC 3000 CONNECTICUT AVENUE NW SUITE 108 WASHINGTON, DC 20008	N/A	P C	FOR THE ANNUAL WOODELY HOUSE MOVIE BENEFIT EVENT	2,500
WORLD CENTRAL KITCHEN 200 MASSACHUSETTS AVENUE NW 7TH FLOOR WASHINGTON, DC 20001	N/A	P C	FOR GENERAL OPERATING SUPPORT	50,000
WORLD CENTRAL KITCHEN 200 MASSACHUSETTS AVENUE NW 7TH FLOOR WASHINGTON, DC 20001	N/A	P C	FOR GENERAL OPERATING SUPPORT	25,000
YALE UNIVERSITY PO BOX 2038 NEW HAVEN, CT 06521	N/A	P C	FOR GENERAL OPERATING SUPPORT	5,000
YALE UNIVERSITY 195 PROSPECT STREET NEW HAVEN, CT 06511	N/A	P C	FOR YALE ENVIRONMENT 360	10,000
Total.			► 3a	4,739,500
b <i>Approved for future payment</i> KHAN ACADEMY INC PO BOX 1630 MOUNTAIN VIEW, CA 94042	N/A	P C	FOR THE KHANMINGO AI POWERED TUTOR PROGRAM	125,000
NATIONAL LINKS TRUST 331 7TH STREET NE WASHINGTON, DC 20002	N/A	P C	FOR THE JACK VARDAMAN WORKFORCE DEVELOPMENT PROGRAM	50,000
SUN VALLEY INSTITUTE FOR RESILIENCE INC PO BOX 3537 HAILEY, ID 83333	N/A	P C	FOR THE IMPACT IDAHO FUND	50,000
Total.			► 3b	225,000

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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 . . .				14	861,758	
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		900003	43,816	18	1,895,604	
9 Net income or (loss) from special events:						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a _____				01	10,741	
b INCOME FROM PARTNERSHIPS			-9,904			
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e) . .			33,912		2,768,103	
13 Total. Add line 12, columns (b), (d), and (e).				13		2,802,015

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

[illegible]

Part XVI

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

(1) Cash.

(2) Other assets.

b Other transactions:

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization

(3)* Rental of facilities, equipment, or other assets.

(4) Reimbursement arrangements.

(5) Loans or loan guarantees.

(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

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

[illegible]

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

b If "Yes," complete the following schedule.

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

Sign Here

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

	2024-11-13
Signature of officer or trustee	Date

Title

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

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name SARAH R PIOT	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01358891
	Firm's name ☐ SCHNEIDER DOWNS & CO INC				Firm's EIN ☐ 25-140870
	Firm's address ☐ ONE PPG PLACE SUITE 1700 PITTSBURGH, PA 15222				Phone no. (412) 261-3644

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION
EIN: 25-1689382

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	30,094	1,387		26,344

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION

EIN: 25-1689382

Identifier	Return Reference	Explanation
	FORM 990-PF, PART XV, LINE 2	THE HEINZ FAMILY FOUNDATION DOES NOT CONSIDER UNSOLICITED REQUESTS FOR GRANTS. THE HEINZ FAMILY FOUNDATION MAKES GRANTS ONLY TO PRIOR SELECTED ORGANIZATIONS THAT ARE QUALIFIED GRANT RECIPIENTS. THE HEINZ FAMILY FOUNDATION IS NOT PERMITTED BY THE U.S. GOVERNMENT TAX LAWS TO MAKE GRANTS TO INDIVIDUALS OR ORGANIZATIONS UNLESS THEY ARE A QUALIFIED 501(C)(3) PUBLIC CHARITY IN THE UNITED STATES, WITH THE EXCEPTION OF THE HEINZ AWARD WINNERS. THE HEINZ AWARDS ARE GRANTED IN ACCORDANCE WITH IRC SECTION 4945(G) ON AN OBJECTIVE AND NONDISCRIMINATORY BASIS PURSUANT TO A PROCEDURE APPROVED IN ADVANCE BY THE INTERNAL REVENUE SERVICE.
	FORM 990-PF, PART VIII, LINE 1	PER SECTION 2.01 OF THE HEINZ FAMILY FOUNDATION BYLAWS, THE DUTIES AND RESPONSIBILITIES OF THE TERM DIRECTORS SHALL BE LIMITED TO ISSUES RELATED TO THE HEINZ AWARDS PROGRAM.

TY 2023 IRS 990 e-File Render**Name:** HEINZ FAMILY FOUNDATION**EIN:** 25-1689382

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ECAM PARTNERS - AWARDS	5,000,000	5,613,005
ECAM PARTNERS - T&J	2,000,000	2,245,202
ISHARES MSCI ACWI EX US ETF - AWARDS	2,415,072	2,737,428
ISHARES MSCI ACWI EX US ETF - T&J	553,378	638,102
ISHARES MSCI CHINA ETF - AWARDS	1,993,939	1,303,680
ISHARES MSCI CHINA ETF - T&J	996,970	651,840
ISHARES RUSSELL 1000 INDEX - AWARDS	3,072,381	4,153,149
ISHARES RUSSELL 1000 INDEX - T&J	733,038	975,607
SCHRODER CORE BOND FUND - AWARDS	8,345,839	7,063,726
SCHRODER CORE BOND FUND - T&J	3,422,702	2,872,098

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION

EIN: 25-1689382

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
LEASEHOLD IMPROVEMENTS	1,299,981	1,299,981	0	0
FURNITURE & FIXTURES	299,272	296,362	2,910	2,910

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION
EIN: 25-1689382

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ABDIEL QUALIFIED OFFSHORE PARTNERS - AWARDS	AT COST	2,000,000	2,775,436
ABDIEL QUALIFIED OFFSHORE PARTNERS - T&J	AT COST	1,000,000	1,387,718
CAT ROCK OPPORTUNITIES FUND - AWARDS	AT COST	597,376	473,077
CAT ROCK OPPORTUNITIES FUND - T&J	AT COST	298,688	236,538
FINE ARTS - BERGSTROM/LIPPS LIBRARY - INVESTMENT IN FINE ARTS	AT COST	479,590	479,590
FPR PARTNERS - AWARDS	AT COST	4,563,459	4,117,438
FPR PARTNERS - T&J	AT COST	2,009,850	1,803,570
INCENTIVE ACTIVE VALUE LONG ONLY, LP - AWARDS	AT COST	3,040,325	3,393,658
INCENTIVE ACTIVE VALUE LONG ONLY, LP - T&J	AT COST	1,520,162	1,696,829
JAPAN ABSOLUTE VALUE FUND, LP - AWARDS	AT COST	2,500,000	2,306,118
JAPAN ABSOLUTE VALUE FUND, LP - T&J	AT COST	1,000,000	922,447
KILTEARN GLOBAL EQUITY FUND - AWARDS	AT COST	2,102,574	3,466,689
KILTEARN GLOBAL EQUITY FUND - T&J	AT COST	1,079,829	1,785,570
OAKMARK INCOME AND EQUITY FUND - EXETER	AT COST	994,490	1,173,228
OAKMARK INCOME AND EQUITY FUND - YALE	AT COST	3,487,188	4,110,804
STOCKBRIDGE FUND, LP - AWARDS	AT COST	3,000,000	3,928,851
STOCKBRIDGE FUND, LP - T&J	AT COST	1,068,525	1,396,471
WGI EMERGING MARKETS FUND - AWARDS	AT COST	1,977,336	2,640,731
WGI EMERGING MARKETS FUND - T&J	AT COST	942,757	1,259,107
WGI EMERGING MARKETS SMALLER CO FUND - AWARDS	AT COST	1,535,511	2,222,691
WGI EMERGING MARKETS SMALLER CO FUND - T&J	AT COST	721,306	1,043,868
WHITESPRUCE FUND LTD. - AWARDS	AT COST	3,065,967	4,266,153
WHITESPRUCE FUND LTD. - T&J	AT COST	1,415,967	1,972,553

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION
EIN: 25-1689382

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	14,370	719		13,651

TY 2023 IRS 990 e-File Render**Name:** HEINZ FAMILY FOUNDATION**EIN:** 25-1689382

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ALUA OFFSHORE FUND, LTD.	1,600,000	1,202,621	1,163,608
CAMBER CAPITAL OFFSHORE	1,700,000	1,482,267	2,243,583
ECOR1 CAPITAL OFFSHORE FUND, LTD.	2,000,000	2,000,000	1,895,071
HOLLYPORT SECONDARY OPPS VI	2,100,158	2,100,158	2,822,912
HORSLEY BRIDGE STRATEGIC FUND IV, L.P.	2,787,097	2,787,097	3,882,507
HUDSON WAY OFFSHORE FUND	1,500,000	1,500,000	1,586,015
KLINE HILL OFFSHORE II	1,268,178	1,268,178	1,276,768
KLINE HILL PARTNERS OFFSHORE FUND III, LP	1,117,700	1,117,700	1,655,222
KLINE HILL PARTNERS OFFSHORE FUND IV, LP	564,737	1,967,466	3,151,477
KLINE HILL PARTNERS OPP OFFSHORE FUND III	343,666	343,666	577,766
M3 PARTNERS, LP	1,700,000	1,473,473	2,127,980
MADISON AVENUE OFFSHORE FUND	1,600,000	1,232,139	2,670,708
MAPLE ROCK OFFSHORE FUND	1,500,000	1,500,000	1,635,311
MELVIN CAPITAL OFFSHORE	1,153	0	0
PARK ST. IX CAP. PRIVATE EQUITY	953,849	909,389	540,561
PARK ST. VII CAP. PRIVATE EQUITY	707,100	707,100	23,850
PARK ST. VIII CAP. PRIVATE EQUITY	705,604	698,004	261,738
PHARO MACRO FUND, LTD.	1,000,000	0	0
POINTER OFFSHORE LTD.	5,800,000	4,891,543	5,915,828
RIVERNORTH INSTITUTIONAL PARTNERS	4,100,000	4,100,000	5,696,485
SQN INVESTORS OFFSHORE	1,700,000	1,700,000	972,799
STARK ASSET MGMT (SHEPHERD)	32,228	6,167	4,647
TENG YUE PARTNERS OFFSHORE	2,200,000	2,200,000	1,235,986

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION

EIN: 25-1689382

Description	Amount
ADJUSTMENT FOR GRANTS PAYABLE	50,000

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION

EIN: 25-1689382

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	11,840	592		11,248
EQUIPMENT & FURNITURE MAINTENANCE	20,147	1,007		19,140
FLOWTHROUGH FROM P-SHIPS	0	337,689		0
PHONE/FAX	5,885	294		5,591
POSTAGE & MESSENGER	3,964	198		3,766
OFFICE MISC	1,117	55		1,061
OFFICE SUPPLIES	1,812	91		1,721
DUES	325	16		309
DIRECT HEINZ AWARD EXPENSE	964,122	0		964,122
RESEARCH EXPENSE	2,631	0		2,631
PERSONAL SERVICES	945,000	0		945,000

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION
EIN: 25-1689382

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
	10,741	10,741	10,741
INCOME FROM PARTNERSHIPS	-9,904	0	-9,904

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION
EIN: 25-1689382

Description	Beginning of Year - Book Value	End of Year - Book Value
AGENCY LIABILITIES	4,658,737	4,517,526

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION

EIN: 25-1689382

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MGMT FEES	598,308	600,781		0
INVESTMENT CONSULTING	7,096	7,096		0

TY 2023 IRS 990 e-File Render

Name: HEINZ FAMILY FOUNDATION

EIN: 25-1689382

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX - FLOWTHROUGH FROM PARTNERSHIPS	0	63,692		0
FEDERAL INCOME TAX	8,122	0		0