Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

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

Name of foundation
The Lynde and Harry Bradley Foundation Inc

A Employer identification number
39-6037928

Number and street (or P.O. box number if mail is not delivered to street address)
1400 North Water Street Suite 300

Room/suite

B Telephone number (see instructions)
(414) 291-9915

City or town, state or province, country, and ZIP or foreign postal code
Milwaukee, WI 532022506

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*) ▶$ 987,072,699

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

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

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

			(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	9,780,460	21,792,373		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	20,898,119			
	b	Gross sales price for all assets on line 6a 128,226,000				
	7	Capital gain net income (from Part IV, line 2)		13,809,605		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances 0				
	b	Less: Cost of goods sold 0				
	c	Gross profit or (loss) (attach schedule)	0			
	11	Other income (attach schedule)	308,839	1,690,376	0	
	12	**Total.** Add lines 1 through 11	30,987,418	37,292,354	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	1,897,592	239,925		1,660,963
	14	Other employee salaries and wages	1,340,331			1,150,677
	15	Pension plans, employee benefits	986,203	53,716		858,627
	16a	Legal fees (attach schedule)	32,140	1,172	0	43,477
	b	Accounting fees (attach schedule)	166,658	40,156	0	64,146
	c	Other professional fees (attach schedule)	6,346,539	5,629,624	0	472,292
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	1,230,169	138,920	0	0
	19	Depreciation (attach schedule) and depletion	205,088	0	0	
	20	Occupancy	570,062			920,668
	21	Travel, conferences, and meetings	439,366			435,758
	22	Printing and publications	9,771			9,829
	23	Other expenses (attach schedule)	1,239,227	3,941,005	0	1,678,404
	24	**Total operating and administrative expenses.** Add lines 13 through 23	14,463,146	10,044,518	0	7,294,841
	25	Contributions, gifts, grants paid	54,397,943			54,127,095
	26	**Total expenses and disbursements.** Add lines 24 and 25	68,861,089	10,044,518	0	61,421,936
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-37,873,671			
	b	**Net investment income** (if negative, enter -0-)		27,247,836		
	c	**Adjusted net income** (if negative, enter -0-)			0	

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

			Beginning of year	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	47,593,502	34,707,300	34,707,300
	3	Accounts receivable ▶ 878,360			
		Less: allowance for doubtful accounts ▶	33,047,714	878,360	878,360
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶	0	0	0
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)	0	0	0
	7	Other notes and loans receivable (attach schedule) ▶ 0			
		Less: allowance for doubtful accounts ▶ 0	0	0	0
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule)	0	0	0
	b	Investments—corporate stock (attach schedule)	233,409,818	282,664,127	282,664,127
	c	Investments—corporate bonds (attach schedule)	0		0
	11	Investments—land, buildings, and equipment: basis ▶ 0			
		Less: accumulated depreciation (attach schedule) ▶ 0	0		0
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	672,719,324	664,144,907	664,144,907
	14	Land, buildings, and equipment: basis ▶ 2,260,923			
		Less: accumulated depreciation (attach schedule) ▶ 762,683	1,649,902	1,498,240	1,498,240
	15	Other assets (describe ▶)	3,452,560	3,179,765	3,179,765
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	991,872,820	987,072,699	987,072,699
Liabilities	17	Accounts payable and accrued expenses	779,893	1,404,148	
	18	Grants payable	17,601,790	17,372,746	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21	Mortgages and other notes payable (attach schedule)	0	0	
	22	Other liabilities (describe ▶)	41,593,183	7,261,624	
	23	**Total liabilities**(add lines 17 through 22)	59,974,866	26,038,518	
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	810,185,662	836,051,126	
	25	Net assets with donor restrictions	121,712,292	124,983,055	
		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)	931,897,954	961,034,181	
	30	**Total liabilities and net assets/fund balances** (see instructions)	991,872,820	987,072,699	

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	931,897,954
2	Enter amount from Part I, line 27a	2	-37,873,671
3	Other increases not included in line 2 (itemize) ▶	3	67,009,898
4	Add lines 1, 2, and 3	4	961,034,181
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	961,034,181

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	P		
b	Partnership K-1 1231 Loss	P	2022-01-01	2023-12-31
c	Partnership K-1 LT Gain	P	2022-01-01	2023-12-31
d	Partnership K-1 ST Loss	P	2023-01-01	2023-12-31
e	Final Gain on Limited Partnership Disposition	P	2022-01-01	2023-12-31
	Partnership Gain on Distributions	P	2022-01-01	2023-12-31

	(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	126,104,086		114,292,110	11,811,976
b	0		30	-30
c	2,346,229		0	2,346,229
d	0		667,992	-667,992
e	282,088			282,088
	37,334			37,334

	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			0	11,811,976
b			0	-30
c			0	2,346,229
d			0	-667,992
e			0	282,088
			0	37,334

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	13,809,605
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	0

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary–see instructions)			1	378,745
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	
3	Add lines 1 and 2			3	378,745
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	378,745
6	Credits/Payments:				
a	2023 estimated tax payments and 2022 overpayment credited to 2023	6a	711,950		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	100,000		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments. Add lines 6a through 6d			7	811,950
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.			8	
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	433,205
11	Enter the amount of line 10 to be: **Credited to 2024 estimated tax** ▶ 433,205	**Refunded** ▶		11	0

Part VI-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ _____ **(2)** On foundation managers. ▶ $ _____			
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.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XIV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ WI			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12	Yes	
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶ www.bradleyfdn.org

14 The books are in care of ▶ Stephen A Langlois Telephone no. ▶ (414) 291-9915

Located at ▶ 1400 N WATER ST 300 MILWAUKEE WI ZIP+4 ▶ 532022506

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**

			Yes	No
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?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

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

			Yes	No
	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?	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?	2a		No
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	Yes	
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		No
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)*

			Yes	No
5a	During the year did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)		No
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		No
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		No
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	5a(4)		No
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)		No
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		
c	Organizations relying on a current notice regarding disaster assistance check ▶ ☐			
d	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? *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
P English 1400 North Water Street Milwaukee, WI 532022506	Chairman & Director 2.000	0	0	0
J Barry 1400 North Water Street Milwaukee, WI 532022506	Vice Chairman & Director 2.000	40,000	0	0
C Mitchell 1400 North Water Street Milwaukee, WI 532022506	Secretary & Director 2.000	34,000	0	0
J A Pope 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	0	0	0
C Culver 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	10,000	0	0
E Scalia 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	0	0	0
P Clement 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	0	0	0
R George 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	26,000	0	0
R Ribble 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	35,000	0	0
V Hanson 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	31,000	0	0
Richard W Graber 1400 North Water Street Milwaukee, WI 532022506	President 50.000	761,181	64,798	909
Stephen A Langlois 1400 North Water Street Milwaukee, WI 532022506	Senior Vice President and Chief Investment Officer 45.000	336,030	75,344	11,004
Alicia Manning 1400 North Water Street Milwaukee, WI 532022506	Vice President for Programs 45.000	266,113	62,539	25,604
Mark Rhode 1400 North Water Street Milwaukee, WI 532022506	Director of Finance 45.000	189,128	52,329	2,022
Kim Magnan 1400 North Water Street Milwaukee, WI 532022506	Director for Human Resources & Administrative Services 45.000	119,929	19,855	547
Carl O Helstrom (Terminated 1312023) 1400 North Water Street Milwaukee, WI 532022506	Vice President for Programs 40.000	56,212	26,119	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
Dionne King 1400 North Water Street Milwaukee, WI 532022506	Dir. of Operations 45.000	123,360	40,439	2,374
Ingrid Gregg 1400 North Water Street Milwaukee, WI 532022506	Sr. Program Officer 40.000	267,116	63,733	32,328
Jason S Crye 1400 North Water Street Milwaukee, WI 532022506	Program Officer 40.000	152,994	48,738	1,723
Christine Czernejewski 1400 North Water Street Milwaukee, WI 532022506	Director of Comms 40.000	111,404	37,245	14,287
Lauren Kuhn 1400 North Water Street Milwaukee, WI 532022506	Director of Events 40.000	99,249	37,478	6,641
Total number of other employees paid over $50,000 . . . . . ▶				7

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
John Roach Projects Inc 2690 Research Park Drive Suite J Fitchburg, WI 53711	Project Management	595,675
Artisan Partners Limited Partnership 875 E Wisconsin Ave Suite 800 MILWAUKEE, WI 53202	Investment Management	554,431
Fiduciary Management 100 E Wisconsin Avenue Suite 2200 MILWAUKEE, WI 53202	Investment Management	428,993
Marquette Associates Inc One Wall Street New York, NY 10286	Investment Management	292,500
Cambridge Associates LLC 125 High Street Boston, MA 021102112	Investment Management	280,439

Total number of others receiving over $50,000 for professional services. . . . . ▶ 14

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 Bradley Prizes honor scholars and practitioners whose accomplishments reflect The Lynde and Harry Bradley's mission to restore, strengthen, and protect the principles and institutions of American exceptionalism. Drawn from a competitive pool of the nation's leading public intellectuals, public servants, and policy experts and ultimately awarded by the Foundation's Board of Directors, the Bradley Prizes seek to elevate the recipients' work and their contributions to the world of ideas and public policy. There were three recipients of the awards in 2023.	1,455,512
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	408,269,182
b	Average of monthly cash balances			1b	34,220,728
c	Fair market value of all other assets (see instructions)			1c	527,727,641
d	**Total** (add lines 1a, b, and c)			1d	970,217,551
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	970,217,551
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)			4	14,553,263
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3			5	955,664,288
6	**Minimum investment return.** Enter 5% (0.05) of line 5			6	47,783,214

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	47,783,214
2a	Tax on investment income for 2022 from Part V, line 5	2a	378,745		
b	Income tax for 2022. (This does not include the tax from Part V.)	2b	59,590		
c	Add lines 2a and 2b			2c	438,335
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	47,344,879
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	47,344,879
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	47,344,879

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	61,421,936
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	53,425
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	0
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part XII, line 4	4	61,475,361

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				47,344,879
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			0	
b Total for prior years: 2021, 2020, 2019		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018. 4,429,423				
b From 2019. 0				
c From 2020. 12,482,334				
d From 2021. 0				
e From 2022. 6,139,777				
f **Total** of lines 3a through e	23,051,534			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ $ 61,475,361				
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				47,344,879
e Remaining amount distributed out of corpus	14,130,482			
5 Excess distributions carryover applied to 2023. *(If an amount appears in column (d), the same amount must be shown in column (a).)*				0
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	37,182,016			
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				
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) . . .	4,429,423			
9 **Excess distributions carryover to 2024.** Subtract lines 7 and 8 from line 6a	32,752,593			
10 Analysis of line 9:				
a Excess from 2019 0				
b Excess from 2020 12,482,334				
c Excess from 2021. . . . 0				
d Excess from 2022 6,139,777				
e Excess from 2023 14,130,482				

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 2023, enter the date of the ruling . . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2023	**(b)** 2022	**(c)** 2021	**(d)** 2020	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed . .					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

Program Team
1400 N Water St
Milwaukee, WI 53202
(414) 291-9915

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

The Lynde and Harry Bradley Foundation accepts applications solely through its online grants-management system. A virtual letter of inquiry (LOI) should briefly describe the project for which support is being sought. If the project falls within the Foundation's current program interests, the organization may be invited to submit a full application. If the LOI is approved, a full application should include the following information: A thorough description of the project, its objectives and significance, and the qualifications and roles of participants The organization's: most current IRS exemption determination letter, current-year annual budget, project budget, if applicable, list of board directors and officers, most recent audited financial statements, most recent IRS Form 990, and any additional materials the applicant thinks will strengthen the case for support - reports, studies, or brochures, for example - which may be uploaded at the end of the application form

c Any submission deadlines:

Full applications are due quarterly: February 15, May 15, August 15 and November 15.

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

The Bradley Foundation can only support organizations that are exempt from federal taxation under Section 501(c)(3) of the Internal Revenue Code and publicly supported under Section 509 (a)(1), (2), or (3), cannot provide grants to individuals and will not fund overhead or indirect costs.

Unclaimed Dividends 2018

Unclaimed Dividends for the year 2018 pertaining to Cipla Limited

Name	Address	Amount	Due Date of Transfer
Abdul Rahman Ali Ali Al Ali	Dubai United Arab Emirates	1.00	30-Aug-2018
Abdulla

Part XV-A Analysis of Income-Producing Activities

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	9,780,460	
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	901101	226,185	18	20,671,934	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a Other Income	901101	95,525	1	213,314	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		321,710		30,665,708	0
13 **Total.** Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				13	30,987,418

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

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

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

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

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

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

b If "Yes," complete the following schedule.

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

Sign Here

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

▶ Signature of officer or trustee — Date 2024-11-15 — ▶ Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶☐	PTIN
Daniel Romano		2024-11-15		P00504182
Firm's name ▶ GRANT THORNTON ADVISORS LLC				Firm's EIN ▶99-1856619
Firm's address ▶ 757 Third Avenue New York, NY 10017				Phone no. (212) 599-0100

Additional Data

Return to Form

Software ID: 23017437
Software Version: 2023v5.1

Form 990PF - Special Condition Description:

Special Condition Description

TY 2023 IRS 990 e-File Render

Name: The Lynde and Harry Bradley Foundation Inc

EIN: 39-6037928

Software ID: 23017437

Software Version: 2023v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Quandt Berndt & Company, LLC	79,986			43,430
Grant Thornton	86,672	40,156		20,716

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: The Lynde and Harry Bradley Foundation Inc

EIN: 39-6037928

Software ID: 23017437

Software Version: 2023v5.1

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
Depreciation		1,708,790		Straight Line	0	205,088			

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: The Lynde and Harry Bradley Foundation Inc

EIN: 39-6037928

Software ID: 23017437

Software Version: 2023v5.1

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
					128,226,000	107,327,881			20,898,119	

TY 2023 IRS 990 e-File Return

Name: The Lynde and Harry Bradley Foundation Inc
EIN: 39-6075000
Software ID: 23017437
Software Version: 2023v5.1

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AAR CORP	255,095	255,095
ABB LTD	3,513,907	3,513,907
ABBOTT LABORATORIES		
ACCELERON INDUSTRIES AG		
ACCENTURE PLC		
ACCESS AG	1,079,209	1,079,209
ADOBE INC	334,693	334,693
ADVANCED ENERGY INDUSTRIES INC	286,242	286,242
AGILENT TECHNOLOGIES INC	125,544	125,544
AGILYSYS INC	355,226	355,226
AIR PRODUCTS AND CHEMICALS INC	307,204	307,204
ALIBABA GROUP HOLDING LTD	1,659,404	1,659,404
ALIGN TECHNOLOGY INC COUCHE-TARD INC.	2,015,667	2,015,667
ALLEGIANT TRAVEL CO	179,511	179,511
ALPHABET INC	9,635,575	9,635,575
ALTERYX INC	189,113	189,113
AMAZON.COM INC	3,212,012	3,212,012
AMEDISYS INC		
AMERICAN EAGLE OUTFITTERS INC		
AMERICAN EXPRESS CO		
AMERICAN TOWER CORP		
AMERIS BANCORP	279,308	279,308
AMGEN INC	594,758	594,758
AMPHENOL CORP	434,090	434,090
ANHUI CONCH CEMENT CO LTD	305,302	305,302
AON PLC	91,671	91,671
APPLE INC	2,882,178	2,882,178
APPLIED MATERIALS INC	213,122	213,122
ARCH CAPITAL GROUP LTD	5,873,272	5,873,272
ARGENX SE	99,292	99,292
ARTHUR J GALLAGHER & CO	298,193	298,193
ASML HOLDING NV	752,378	752,378
ASSOCIATED BRITISH FOODS PLC	1,464,852	1,464,852
ATLANTA BRAVES HOLDINGS INC	1,020,372	1,020,372
AUTODESK INC		
AVERY DENNISON CORP	4,802,109	4,802,109
AVALTA COATING SYSTEMS LTD	978,336	978,336
AVIANCA INC	192,291	192,291
AZEK CO INC/THE	276,433	276,433
BADGER METER INC	168,263	168,263
BAILLIE GIFFORD - INTL - LC		
BARRY CALLEBAUT AG	48,893	48,893
BASF SE	864,057	864,057
BECTON DICKINSON & CO	209,694	209,694
BERKELEY GROUP HOLDINGS PLC	1,071,783	1,071,783
BERKSHIRE HATHAWAY INC	5,049,592	5,049,592
BERRY GLOBAL GROUP INC	289,710	289,710
BIO-TECHNE CORP	232,946	232,946
BI'S RESTAURANTS INC		
BLACK KNIGHT INC		
BLACKLINE INC		
BLACKROCK INC	2,345,290	2,345,290
BLOCK INC		
BOEKING HOLDINGS INC	4,919,994	4,919,994
BOSTON SCIENTIFIC CORP	962,198	962,198
BRENNTAG SE	215,482	215,482
BWX TECHNOLOGIES INC	1,057,570	1,057,570
CACI INTERNATIONAL INC	378,268	378,268
CADENCE BANK	411,301	411,301
CADENCE DESIGN SYSTEMS INC	875,125	875,125
CAISARMAN SA		
CANADIAN PACIFIC RAILWAY LTD	28,778	28,778
CARGEMINE SE	1,536,456	1,536,456
CAPRI HOLDINGS LTD		
CARLISLE COS INC	4,295,358	4,295,358
CARMAX INC	3,326,219	3,326,219
CARRIER GLOBAL CORP	3,819,965	3,819,965
CARTER'S INC	1,531,873	1,531,873
CASELLA WASTE SYSTEMS INC	438,837	438,837
CASEY'S GENERAL STORES INC	264,845	264,845
CDW CORP/THE	334,410	334,410
CDW CORP/DE	2,621,909	2,621,909
CHARLES SCHWAB CORP/THE	5,937,092	5,937,092
CHIPOTLE MEXICAN GRILL INC	110,841	110,841
CHOICE HOTELS INTERNATIONAL IN	137,932	137,932
CHORD ENERGY CORP	273,448	273,448
CHURCHILL DOWNS INC	249,621	249,621
CIT FINANCIERE RICHEMONT SA	1,818,663	1,818,663
CIRNA CORP	225,500	225,500
CLEAN HARBORS INC	285,963	285,963
CMC GROUP INC	238,189	238,189
CNH INDUSTRIAL NV	872,743	872,743
COCA-COLA CONSOLIDATED INC	168,969	168,969
COLGATE-PALMOLIVE CO	131,840	131,840
COLUMBIA SPORTSWEAR CO	101,870	101,870
COMPASS GROUP PLC	2,162,642	2,162,642
COMPASS MINERALS INTERNATIONAL	642,495	642,495
COSTAR GROUP INC	374,327	374,327
COUSINS PROPERTIES INC		
CRANE CO	348,040	348,040
CRANE NXT CO	253,981	253,981
CRH PLC		
DANAHER CORP		
DANONE SA	4,186,131	4,186,131
DARDEN INC	99,288	99,288
DESCARTES SYSTEMS GROUP INC/TH	424,923	424,923
DEVON ENERGY CORP	281,585	281,585
DICKS SPORTING GOODS INC	3,291,214	3,291,214
DOLLAR TREE INC	3,194,278	3,194,278
DOMINO'S PIZZA INC	752,635	752,635
DUN & BRADSTREET HOLDINGS INC	903,240	903,240
EAGLE MATERIALS INC	251,116	251,116
EATON CORP PLC	2,274,786	2,274,786
ECOVYST INC	1,057,114	1,057,114
ELANCO ANIMAL HEALTH INC	1,479,570	1,479,570
ELECTRONIC ARTS INC		
ELEMENT SOLUTIONS INC	372,480	372,480
EI LILLY & CO	1,216,554	1,216,554
EMCOR GROUP INC	368,385	368,385
ENCOMPASS HEALTH CORP	155,791	155,791
ENDAVA PLC		
ENERSYS	251,996	251,996
ENPHASE ENERGY INC		
ENPRO INC	608,621	608,621
ENPRO INDUSTRIES INC		
ENSIGN GROUP INC/THE	354,247	354,247
EOG RESOURCES INC		
EQUIFAX INC		
EQUITY COMMONWEALTH	185,357	185,357
ESTEE LAUDER COS INC/THE	234,879	234,879
FERGUSON PLC	6,019,341	6,019,341
FIRST INDUSTRIAL REALTY TRUST	347,253	347,253
FIRT BELGIM INC	251,318	251,318
FIVER INC	237,722	237,722
FORWARD AIR CORP	98,454	98,454
FOX FACTORY HOLDING CORP	239,217	239,217
FRESENIUS MEDICAL CARE AG	2,784,089	2,784,089
FRESENIUS MEDICAL CARE AG & CO		
GARMIN LTD	2,073,479	2,073,479
GARTNER INC	416,824	416,824
GENTEX CORP	287,245	287,245
GILDAN ACTIVEWEAR INC	301,110	301,110
GLACIER BANCORP INC	274,117	274,117
GLOBUS MEDICAL INC	246,147	246,147
GRAPHIC PACKAGING HOLDING CO	1,556,376	1,556,376
GRIFFON CORP	249,895	249,895
GROUPE BRUXELLES LAMBERT SA	1,106,074	1,106,074
GRUMA SAB DE CV	724,177	724,177
HAIN CELESTIAL GROUP INC/THE	46,275	46,275
HALOZYME THERAPEUTICS INC	199,032	199,032
HANESBRANDS INC		
HARLEY-DAVIDSON INC	123,782	123,782
HERGAN INTERNATIONAL GROUP INC	302,494	302,494
HESS CORP	86,064	86,064
HILTON WORLDWIDE HOLDINGS INC	570,124	570,124
HOLCIM AG	2,001,426	2,001,426
HORIZON THERAPEUTICS PLC		
HOWMET AEROSPACE INC	332,567	332,567
HSBC BANK PLC		
HSBC BANK PLC	1,711,413	1,711,413
HUB GROUP INC	401,680	401,680
HUNTSMAN CORP	117,382	117,382
IDEX CORP	168,710	168,710
IMAX CORP		
INCYCARE PLC	46,265	46,265
INFINERA CORP	1,139,316	1,139,316
ING GROEP NV		
INGEVITY CORP	145,296	145,296
INGREDION INC	1,172,124	1,172,124
INSTALLED BUILDING PRODUCTS IN	313,353	313,353
INSULET CORP	210,037	210,037
INTEGRA LIFESCIENCES HOLDINGS	89,931	89,931
INTER PARFUMS INC	225,952	225,952
INTUIT INC	647,531	647,531
ISHARES MUSSELL 2000 VALUE E		
ITT INC	458,427	458,427
IVECO GROUP NV		
J & J SNACK FOODS CORP	173,826	173,826
JOHNSON CONTROLS INTERNATIONAL		
JPMORGAN CHASE & CO		
KBR INC	543,018	543,018
KKR & CO INC	48,136	48,136
KLA CORP	380,170	380,170
KONINKLIJKE PHILIPS NV	5,290,020	5,290,020
LAKELAND FINANCIAL CORP		
LAM RESEARCH CORP	424,527	424,527
LAS VEGAS SANDS CORP	103,489	103,489
LIBERTY GLOBAL LTD	912,942	912,942
LIBERTY GLOBAL PLC		
LIBERTY MEDIA CORP-LIBERTY BRA		
LINDE PLC	873,991	873,991
LIONS GATE ENTERTAINMENT CORP	1,192,230	1,192,230
LITTELFUSE INC	326,537	326,537
LIVENT CORP	746,170	746,170
LOYDS BANKING GROUP PLC	1,691,285	1,691,285
LULULEMON ATHLETICA INC	223,434	223,434
LVMH MOET HENNESSY LOUIS VUITT	482,981	482,981
MADISON SQUARE GARDEN SPORTS C	1,060,065	1,060,065
MARTIN MARIETTA MATERIALS INC	196,571	196,571
MASCO CORP	112,056	112,056
MASCO CORP	4,578,016	4,578,016
MASTERCARD INC	1,906,926	1,906,926
MATADOR RESOURCES CO	382,554	382,554
MATCH GROUP INC		
MATERION CORP	251,541	251,541
MAXIMUS INC	261,056	261,056
MERIDIAN HOLDINGS INC	249,519	249,519
META PLATFORMS INC	2,252,601	2,252,601
MICRON TECHNOLOGY INC	5,111,525	5,111,525
MICROSOFT CORP	7,117,309	7,117,309
MODEL N INC	232,379	232,379
MOLSON MANUFACTURING CO	481,063	481,063
MOHAWK INDUSTRIES INC	1,240,448	1,240,448
MOODY'S CORP	48,429	48,429
MOTOROLA INC	752,880	752,880
NAVER CORP	1,129,131	1,129,131
NEOGEN CORP	839,182	839,182
NOKIA OYJ	1,259,328	1,259,328
NORTHERN TRUST CORP	3,071,601	3,071,601
NOVARTIS AG	4,280,255	4,280,255
NVIDIA CORP	2,908,422	2,908,422
OANDCON GROUP INC	3,029,580	3,029,580
ONTO INNOVATION INC	299,225	299,225
O'REILLY AUTOMOTIVE INC	355,330	355,330
ORTHOPEDI MEDICAL INC		
PACCAR INC		
PAYCHEX INC	333,428	333,428
PEARSON PLC	856,357	856,357
PENN ENTERTAINMENT INC	697,336	697,336
PHIEESIA INC		
PROGRESSIVE CORP/THE	2,908,134	2,908,134
PURE STORAGE INC	190,424	190,424
QUIDELORTHO CORP	611,710	611,710
RAMBUS INC	196,765	196,765
RBC BEARINGS INC	262,669	262,669
REGAL REXNORD CORP	230,467	230,467
REGENERON PHARMACEUTICALS INC	173,033	173,033
RELX PLC	859,092	859,092
ROCKWELL AUTOMATION INC	261,424	261,424
RYMAR HOLDINGS PLC	152,935	152,935
SAFRAN SA	2,416,391	2,416,391
SAILING INC ELECTRONICS CO LTD	5,946,792	5,946,792
SANDOZ GROUP AG	376,297	376,297
SAP SE	2,855,277	2,855,277
SCHLUMBERGER LTD	1,864,593	1,864,593
SEACOAST BANKING CORP OF FLORI	329,254	329,254
SEALED TECHNOLOGIES HOLDING P	1,018,251	1,018,251
SERVICENOW INC	859,092	859,092
SEVEN & I HOLDINGS CO LTD	877,071	877,071
SHERWIN-WILLIAMS CO/THE	290,067	290,067
SHOPIFY INC		
SILGAN HOLDINGS INC	361,683	361,683
SILICON LABORATORIES INC	243,906	243,906
SMITH & NEPHEW PLC	2,289,419	2,289,419
SODEXO SA	1,976,302	1,976,302
SODEXO SA PF-2026	165,398	165,398
SOITEC SA ORD	5,019,422	5,019,422
SOUTHSTATE CORP	380,109	380,109
SPOTIFY TECHNOLOGY SA	317,756	317,756
STAR TECHNOLOGIES INC	417,777	417,777
STAG INDUSTRIAL INC	282,279	282,279
STANDEX INTERNATIONAL CORP	244,064	244,064
STERIS PLC	186,231	186,231
STEVEN MADDEN LTD	288,834	288,834
SUMCOR ENERGY INC	1,481,629	1,481,629
SYNOPSYS INC	746,105	746,105
TAKE-TWO INTERACTIVE SOFTWARE	3,283,020	3,283,020
TAKE-TWO INTERACTIVE SOFTWARE	174,725	174,725
TELEFONICA BRASIL SA	245,449	245,449
TENABLE HOLDINGS INC	118,428	118,428
TETRA TECH INC		
TEXAS ROADHOUSE INC	367,668	367,668
THERMO FISHER SCIENTIFIC INC	545,121	545,121
TIMKEN CO/THE	193,802	193,802
TJX COS INC/THE	1,362,778	1,362,778
TOPGOLF CALLAWAY BRANDS CORP	1,114,218	1,114,218
TRANSUNION	130,686	130,686
TREEHOUSE FOODS INC	584,445	584,445
TRIP.COM GROUP LTD	741,731	741,731
UBER TECHNOLOGIES INC	424,033	424,033
UNI GROUP AG	4,420,704	4,420,704
UFP INDUSTRIES INC	401,886	401,886
UPATH INC	1,536,056	1,536,056
ULTRA CLEAN HOLDINGS INC	1,406,568	1,406,568
UNDER ARMOUR INC		
UNILEVER PLC	5,212,811	5,212,811
UNITED BANKSHARES INC/WV	241,972	241,972
UNITED COMMUNITY BANKS INC/GA	232,646	232,646
UNITEDHEALTH GROUP INC	4,940,921	4,940,921
UNIVAR SOLUTIONS INC		
UNIVERSAL DISPLAY CORP	474,325	474,325
UNIVERSAL ELECTRONICS INC	45,081	45,081
UNIVERSAL MUSIC GROUP NV	912,752	912,752
URBAN OUTFITTERS INC	585,316	585,316
VAIL RESORTS INC	203,010	203,010
VARONIS SYSTEMS INC	867,195	867,195
VEEVA SYSTEMS INC	134,186	134,186
VERACITE INC	175,761	175,761
VERAXION INC		
VERISK INC	159,960	159,960
VERTEX ANALYTICS INC	810,691	810,691
VERTEX PHARMACEUTICALS INC	923,640	923,640
VICOR CORP	117,387	117,387
VISA INC	1,619,898	1,619,898
VULCAN MATERIALS CO	905,089	905,089
WELLS FARGO WATSON PLC	2,437,080	2,437,080
WEST PHARMACEUTICAL SERVICES	333,570	333,570
WERTIS INC	348,753	348,753
WEST WATER WATER SOLUTIONS COR		

TY 2023 IRS 990 e-File Render

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EIN: 39-6037928
Software ID: 23017437
Software Version: 2023v5.1

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Commingled LP #1	FMV	48,276,021	48,276,021
Commingled LP #10	FMV	15,654,005	15,654,005
Commingled LP #2	FMV	22,668,241	22,668,241
Commingled LP #3	FMV	20,701,508	20,701,508
Commingled LP #4	FMV	20,355,214	20,355,214
Commingled LP #5	FMV	37,287,878	37,287,878
Commingled LP #6	FMV	42,467,858	42,467,858
Commingled LP #7	FMV	24,089,569	24,089,569
Commingled LP #8	FMV	22,774,344	22,774,344
Commingled LP #9	FMV	35,029,634	35,029,634
FIDELITY BALANCED	FMV	172,928	172,928
Fixed Income Fund #1	FMV	39,869,312	39,869,312
Fixed Income Fund #2	FMV	30,667,177	30,667,177
Hedge Fund #10	FMV	9,298	9,298
Hedge Fund #26	FMV	15,333	15,333
Hedge Fund #36	FMV		
Hedge Fund #38	FMV	15,639,639	15,639,639
Hedge Fund #39	FMV	12,450,696	12,450,696
Hedge Fund #40	FMV	11,556,018	11,556,018
Hedge Fund #41	FMV	17,893,350	17,893,350
Hedge Fund #42	FMV		
Hedge Fund #43	FMV	15,836,010	15,836,010
Hedge Fund #44	FMV	10,598,185	10,598,185
Limited Partnership #1	FMV	536,516	536,516
Limited Partnership #100	FMV	228,532	228,532
Limited Partnership #101	FMV	1,667,238	1,667,238
Limited Partnership #102	FMV	2,568,947	2,568,947
Limited Partnership #103	FMV	7,002,518	7,002,518
Limited Partnership #104	FMV	2,757,350	2,757,350
Limited Partnership #105	FMV	1,828,449	1,828,449
Limited Partnership #106	FMV	1,874,558	1,874,558
Limited Partnership #107	FMV	1,693,494	1,693,494
Limited Partnership #108	FMV	4,165,490	4,165,490
Limited Partnership #110	FMV	3,373,889	3,373,889
Limited Partnership #111	FMV	405,541	405,541
Limited Partnership #112	FMV	2,178,457	2,178,457
Limited Partnership #113	FMV	153,536	153,536
Limited Partnership #114	FMV	2,429,941	2,429,941
Limited Partnership #115	FMV	3,759,675	3,759,675
Limited Partnership #116	FMV	2,655,814	2,655,814
Limited Partnership #117	FMV	1,968,266	1,968,266
Limited Partnership #118	FMV	2,856,450	2,856,450
Limited Partnership #119	FMV	3,206,317	3,206,317
Limited Partnership #12	FMV	157,331	157,331
Limited Partnership #120	FMV	918,725	918,725
Limited Partnership #121	FMV	489,799	489,799
Limited Partnership #122	FMV	927,650	927,650
Limited Partnership #123	FMV	526,622	526,622
Limited Partnership #124	FMV	141,465	141,465
Limited Partnership #125	FMV	143,650	143,650
Limited Partnership #126	FMV	208,508	208,508
Limited Partnership #127	FMV	271,985	271,985
Limited Partnership #128	FMV	0	0
Limited Partnership #14	FMV	499,091	499,091
Limited Partnership #15	FMV	17,034	17,034
Limited Partnership #16	FMV	22,833	22,833
Limited Partnership #17	FMV	0	0
Limited Partnership #18	FMV	1,106	1,106
Limited Partnership #19	FMV	690,154	690,154
Limited Partnership #2	FMV	1,340,624	1,340,624
Limited Partnership #20	FMV	231,227	231,227
Limited Partnership #21	FMV	10,794,517	10,794,517
Limited Partnership #22	FMV	804,083	804,083
Limited Partnership #23	FMV	13,296	13,296
Limited Partnership #24	FMV	14,851	14,851
Limited Partnership #25	FMV	0	0
Limited Partnership #26	FMV	1,011,855	1,011,855
Limited Partnership #27	FMV	15,836	15,836
Limited Partnership #28	FMV	15,547	15,547
Limited Partnership #29	FMV	28,577	28,577
Limited Partnership #3	FMV	2,006,336	2,006,336
Limited Partnership #32	FMV	301,030	301,030
Limited Partnership #33	FMV	6,066,254	6,066,254
Limited Partnership #34	FMV	8,997,139	8,997,139
Limited Partnership #35	FMV	392,883	392,883
Limited Partnership #36	FMV	270,535	270,535
Limited Partnership #37	FMV	685,107	685,107
Limited Partnership #38	FMV	881,506	881,506
Limited Partnership #39	FMV	705,321	705,321
Limited Partnership #4	FMV	2,072,053	2,072,053
Limited Partnership #40	FMV	1,033,595	1,033,595
Limited Partnership #42	FMV	1,112	1,112
Limited Partnership #43	FMV	2,438,791	2,438,791
Limited Partnership #44	FMV	4,446,199	4,446,199
Limited Partnership #46	FMV	164,861	164,861
Limited Partnership #47	FMV	876,619	876,619
Limited Partnership #48	FMV	6,697	6,697
Limited Partnership #49	FMV	0	0
Limited Partnership #5	FMV	3,735,642	3,735,642
Limited Partnership #50	FMV	244,954	244,954
Limited Partnership #6	FMV	821,359	821,359
Limited Partnership #64	FMV	1,339,051	1,339,051
Limited Partnership #65	FMV	1,456,360	1,456,360
Limited Partnership #66	FMV	282,641	282,641
Limited Partnership #67	FMV	1,353,038	1,353,038
Limited Partnership #69	FMV	7,888,820	7,888,820
Limited Partnership #7	FMV	0	0
Limited Partnership #70	FMV	6,428,348	6,428,348
Limited Partnership #71	FMV	1,395,878	1,395,878
Limited Partnership #72	FMV	1,848,217	1,848,217
Limited Partnership #73	FMV	2,331,633	2,331,633
Limited Partnership #74	FMV	4,322,878	4,322,878
Limited Partnership #75	FMV	2,766,451	2,766,451
Limited Partnership #76	FMV	1,285,747	1,285,747
Limited Partnership #77	FMV	8,167,180	8,167,180
Limited Partnership #78	FMV	2,453,707	2,453,707
Limited Partnership #79	FMV	3,048,450	3,048,450
Limited Partnership #8	FMV	1,797,975	1,797,975
Limited Partnership #80	FMV	2,124,445	2,124,445
Limited Partnership #81	FMV	3,749,539	3,749,539
Limited Partnership #82	FMV	2,796,183	2,796,183
Limited Partnership #83	FMV	2,403,005	2,403,005
Limited Partnership #84	FMV	1,307,622	1,307,622
Limited Partnership #85	FMV	469,246	469,246
Limited Partnership #86	FMV	425,470	425,470
Limited Partnership #87	FMV	5,765,553	5,765,553
Limited Partnership #88	FMV	7,961,137	7,961,137
Limited Partnership #89	FMV	1,119,928	1,119,928
Limited Partnership #9	FMV	181,840	181,840
Limited Partnership #90	FMV	3,791,373	3,791,373
Limited Partnership #91	FMV	725,213	725,213
Limited Partnership #92	FMV	652,571	652,571
Limited Partnership #93	FMV	9,757,797	9,757,797
Limited Partnership #94	FMV	4,169,374	4,169,374
Limited Partnership #95	FMV	772,820	772,820
Limited Partnership #96	FMV	3,948,647	3,948,647
Limited Partnership #97	FMV	2,875,383	2,875,383
Limited Partnership #98	FMV	2,475,193	2,475,193
Limited Partnership #99	FMV	11,748,639	11,748,639

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Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	70,631	44,060	26,571	26,571
Technology	213,229	126,432	86,797	86,797
Leasehold Improvements	1,977,063	592,191	1,384,872	1,384,872
Assets in Progress	0		0	

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foley & Lardner, LLP	32,140			43,477
Legal fees from pass through investments		1,172		

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Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTANGIBLES	30,991	30,991	30,991
Right of Use Assets	3,421,569	3,148,774	3,148,774

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Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Office Supplies	28,489	1,343		25,518
Computer and Office Equipment	61,302			54,828
IT Software and Services	112,070	10,015		82,856
Dues and Fees	26,919			7,695
Miscellaneous Expenses	35,203			35,223
Reception and Awards Event	955,512			1,455,512
Other expenses from pass through		3,924,869		
Insurance	19,732	2,960		16,772
Deductions reported on form 1099		1,818		

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Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other INCOME	308,839	72,561	
Other Income from pass through		1,617,815	

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Description	Amount
Unrealized Gains	67,009,898

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Description	Beginning of Year - Book Value	End of Year - Book Value
Pending Purchases	35,057,260	318,061
Long Term Lease Liability	4,070,923	3,721,563
Deferred Tax Liability	2,465,000	3,222,000

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGER FEES	2,466,879	2,374,224		0
CUSTODIAN FEES	385,505	298,344		
CONSULTING FEES - INVESTMENTS	565,439	565,439		
INVESTMENT MANAGEMENT FEES	2,391,617	2,391,617		
CONSULTING - EXTERNAL RELATIONS	223,855			215,855
PAYROLL SERVICE	8,799			8,799
Grants Management Software Consulting	64,515			60,907
IT Services	154,026			109,384
General Consulting	85,904			77,347

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE AND INCOME TAXES	1,230,169			
Tax from pass through		138,920		