

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.

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

Name of foundation: Sid W Richardson Foundation. A Employer identification number: 75-6015828. B Telephone number. C If exemption application is pending. D 1. Foreign organizations. D 2. Foreign organizations meeting the 85% test. E If private foundation status was terminated. F If the foundation is in a 60-month termination. H Check type of organization. I Fair market value of all assets at end of year. J Accounting method.

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

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include: 1 Contributions, gifts, grants, etc., received; 2 Check if foundation is not required to attach Sch. B; 3 Interest on savings and temporary cash investments; 4 Dividends and interest from securities; 5a Gross rents; b Net rental income or (loss); 6a Net gain or (loss) from sale of assets not on line 10; b Gross sales price for all assets on line 6a; 7 Capital gain net income; 8 Net short-term capital gain; 9 Income modifications; 10a Gross sales less returns and allowances; b Less: Cost of goods sold; c Gross profit or (loss); 11 Other income; 12 Total. Add lines 1 through 11; 13 Compensation of officers, directors, trustees, etc.; 14 Other employee salaries and wages; 15 Pension plans, employee benefits; 16a Legal fees; b Accounting fees; c Other professional fees; 17 Interest; 18 Taxes; 19 Depreciation and depletion; 20 Occupancy; 21 Travel, conferences, and meetings; 22 Printing and publications; 23 Other expenses; 24 Total operating and administrative expenses; 25 Contributions, gifts, grants paid; 26 Total expenses and disbursements; 27 Subtract line 26 from line 12; a Excess of revenue over expenses and disbursements; b Net investment income; c Adjusted net income.

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	1,306,814	911,202	911,202
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ <u>1,246,239</u>			
	Less: allowance for doubtful accounts ▶ _____	1,688,606	1,246,239	1,246,239
	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	399	662	662
	9 Prepaid expenses and deferred charges	115,859	117,855	117,855
	10a Investments—U.S. and state government obligations (attach schedule)	98,984,548	85,693,515	85,693,515
	b Investments—corporate stock (attach schedule)	296,989,419	337,167,866	337,167,866
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ <u>2,218,145</u>			
Less: accumulated depreciation (attach schedule) ▶ <u>557,794</u>	1,661,017	1,660,351	61,407,415	
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	57,301,454	54,982,714	54,982,714	
14 Land, buildings, and equipment: basis ▶ <u>9,886,609</u>				
Less: accumulated depreciation (attach schedule) ▶ <u>6,093,378</u>	4,008,443	3,793,231	3,793,231	
15 Other assets (describe ▶ _____)	10,759,461	10,759,443	194,694,456	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	472,816,020	496,333,078	740,015,155	
Liabilities	17 Accounts payable and accrued expenses	838,357	741,189	
	18 Grants payable	1,560,000	5,455,000	
	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 ▶ _____)	2,623,632	3,274,849	
	23 Total liabilities (add lines 17 through 22)	5,021,989	9,471,038	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	467,794,031	486,862,040	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here <input type="checkbox"/> 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)	467,794,031	486,862,040		
30 Total liabilities and net assets/fund balances (see instructions)	472,816,020	496,333,078		

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	467,794,031
2 Enter amount from Part I, line 27a	2	-15,776,908
3 Other increases not included in line 2 (itemize) ▶ _____	3	34,844,917
4 Add lines 1, 2, and 3	4	486,862,040
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	486,862,040

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 32242ac Altamesa Blvd Dirks Rd	D	1962-01-01	2023-07-20
b Publicly Traded Securities	P		
c Publicly Traded Securities	P		
d US Treasury Notes	P		
e US Treasury Notes	P		

(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 2,882,281		29,734	2,852,547
b 17,381,004		18,099,223	-718,219
c 3,678,486		4,380,124	-701,638
d 90,201,805		92,303,391	-2,101,586
e 29,508,408		28,972,646	535,762

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (i) over col. (j), if any	
a			2,852,547
b			-718,219
c			-701,638
d			-2,101,586
e			535,762

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	-133,134
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	-701,639

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		1	211,834
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	211,834
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	211,834
6 Credits/Payments:			
a 2023 estimated tax payments and 2022 overpayment credited to 2023	6a 216,698		
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c 75,000		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		7	291,698
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	79,864
11 Enter the amount of line 10 to be: Credited to 2024 estimated tax Refunded		11	
	79,864		

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?
- b** Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.
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?
- 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.
- 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*
- 4a** Did the foundation have unrelated business gross income of \$1,000 or more during the year?
- b** If "Yes," has it filed a tax return on **Form 990-T** for this year?
- 5** Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.
- 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?
- 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.*
- 8a** Enter the states to which the foundation reports or with which it is registered (see instructions)
▶ TX _____
- 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*
- 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*
- 10** Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*
- 11** At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? *If "Yes," attach schedule. See instructions.*
- 12** Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? *If "Yes," attach statement. See instructions*
- 13** Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ www.sidrichardson.org

	Yes	No
1a		No
1b		No
1c		No
2		No
3		No
4a		No
4b		
5		No
6	Yes	
7	Yes	
8b	Yes	
9		No
10		No
11		No
12		No
13	Yes	

14 The books are in care of ▶ Preston M Geren III Telephone no. ▶ (817) 336-0494
 Located at ▶ 309 Main Street Fort Worth TX ZIP+4 ▶ 76102

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. *If "Yes", enter the name of the foreign country* ▶ _____

	Yes	No
16		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.

- 1a** During the year did the foundation (either directly or indirectly):
 - (1)** Engage in the sale or exchange, or leasing of property with a disqualified person?
 - (2)** Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
 - (3)** Furnish goods, services, or facilities to (or accept them from) a disqualified person?
 - (4)** Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
 - (5)** Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?
 - (6)** Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)
- b** If any answer is "Yes" to 1a(1)–(6); did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions
- c** Organizations relying on a current notice regarding disaster assistance check here.
- d** Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2023?
- 2** Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
 - a** At the end of tax year 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?
If "Yes," list the years ► 20___, 20___, 20___, 20___
 - b** Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)
 - c** If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here.
► 20___, 20___, 20___, 20___
- 3a** Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
- b** If "Yes," did it have excess business holdings in 2023 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2023.)
- 4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
- b** Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2023?

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

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

- 5a** During the year did the foundation pay or incur any amount to:
 - (1)** Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?
 - (2)** Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
 - (3)** Provide a grant to an individual for travel, study, or other similar purposes?
 - (4)** Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions
 - (5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?
- b** If any answer is "Yes" to 5a(1)–(5); did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions
- c** Organizations relying on a current notice regarding disaster assistance check
- d** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?
If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
If "Yes" to 6b, file Form 8870.
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?
- b** If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
- 8** Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

	Yes	No
5a(1)		No
5a(2)		No
5a(3)		No
5a(4)		No
5a(5)		No
5b		
5d		
6a		No
6b		No
7a		No
7b		
8		No

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Preston M Geren III 309 Main Street Fort Worth, TX 76102	President & CEO 40.00	901,089	97,186	39,715
Edward P Bass 309 Main Street Fort Worth, TX 76102	Chairman 1.00	2,500	0	0
Sid R Bass 309 Main Street Fort Worth, TX 76102	Vice President 0.50	2,500	0	0
Lee M Bass 309 Main Street Fort Worth, TX 76102	Vice President 0.50	2,500	0	0
Dee Steer 309 Main Street Fort Worth, TX 76102	Secretary 0.50	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Carolyn Johns 309 Main Street Fort Worth, TX 76102	Senior Admin Officer 35.00	127,498	53,648	20,070
Marie Hunzeker 309 Main Street Fort Worth, TX 76102	Controller 40.00	141,580	38,938	16,843
Scott Winterrowd 309 Main Street Fort Worth, TX 76102	Museum Director 40.00	124,816	37,237	15,263
Leslie Cleere 309 Main Street Fort Worth, TX 76102	SiteExhibitions Coo 40.00	75,126	33,593	9,021
Leslie Thompson 309 Main Street Fort Worth, TX 76102	Director of Adult Pr 40.00	53,838	20,287	26,587

Total number of other employees paid over \$50,000. ▶ **6**

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
Luther King Capital Management 201 Commerce Street Suite 2500 Fort Worth, TX 76102	Investment Mgmt	944,966
JP Morgan Chase Bank 712 Main 13th Floor North Houston, TX 77002	Trust Custodian	103,325
Anamaria Suescun-Fast talkStrategy PO Box 761473 San Antonio, TX 782456473	PR & Advertising	89,311
William H Koehler 6417 Drury Lane Fort Worth, TX 76116	Education Consulta	81,000

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

Part VIII- Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 Western art museum - approximately 28000 people visited in 2023 and thousands more engaged online	1,500,412
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 N A	0
2	
3 All other program-related investments. See instructions.	

Total. Add lines 1 through 3 ▶

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	315,272,953
b	Average of monthly cash balances.	1b	56,006,272
c	Fair market value of all other assets (see instructions).	1c	147,014,850
d	Total (add lines 1a, b, and c).	1d	518,294,075
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d.	3	518,294,075
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	7,774,411
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	510,519,664
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	25,525,983

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	25,525,983
2a	Tax on investment income for 2022 from Part V, line 5.	2a	211,834
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	211,834
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	25,314,149
4	Recoveries of amounts treated as qualifying distributions.	4	9,465
5	Add lines 3 and 4.	5	25,323,614
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	25,323,614

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	25,886,922
b	Program-related investments—total from Part VIII-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	37,987
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	25,924,909

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				25,323,614
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			46,598	
b Total for prior years: 20 ____, 20 ____, 20 ____				
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.				
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ <u>25,924,909</u>				
a Applied to 2022, but not more than line 2a			46,598	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2023 distributable amount				25,323,614
e Remaining amount distributed out of corpus	554,697			
5 Excess distributions carryover applied to 2023. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	554,697			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.				
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).				
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	554,697			
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	554,697			

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 <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2023	(b) 2022	(c) 2021	(d) 2020	
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).)
N A
- 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.
N A

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:
Preston Geren
309 Main Street
Fort Worth, TX 76102
(817) 336-0494
pgeren@sidrichardson.org
- b** The form in which applications should be submitted and information and materials they should include:
Letter describing program or project; see more information at www.sidrichardson.org
- c** Any submission deadlines:
January 15
- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
Serves the people of Texas in the arts, humanities, health and education.

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See attached list 309 Main Street Fort Worth, TX 76102	None		Support	22,830,417
Total ▶ 3a				22,830,417

b <i>Approved for future payment</i> See attached list 309 Main Street Fort Worth, TX 76102	None		Support	5,455,000
Total ▶ 3b				5,455,000

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

1 Program service revenue:

- a
b
c
d
e
f

g Fees and contracts from government agencies

2 Membership dues and assessments

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5 Net rental income or (loss) from real estate:

- a Debt-financed property.
b Not debt-financed property.

6 Net rental income or (loss) from personal property

7 Other investment income

8 Gain or (loss) from sales of assets other than inventory

9 Net income or (loss) from special events:

10 Gross profit or (loss) from sales of inventory

11 Other revenue:

- a Oil & Gas Royalties
b Misc Oil & Gas
c
d
e

12 Subtotal. Add columns (b), (d), and (e)

13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)

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

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

Table with 2 columns: Line No., Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes.

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Audit & Tax Review Fees	53,844	13,671	0	40,173
Accounting Consulting	1,000	0	0	1,000

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: Sid W Richardson Foundation

EIN: 75-6015828

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
Investment Assets	2021-01-01	984,558	529,045	SL	5	26,022	26,022	0	
Exempt Assets	2021-01-01	9,806,974	5,822,339	SL	5	267,631	0	0	
IA IWave Air Purifiers	2022-05-31	8,263	207	SL	20	413	413	0	
EA IWave Air Purifiers	2022-05-31	8,263	207	SL	20	413	0	0	
EA Chair for Security Guards	2022-09-21	2,254	225	SL	5	451	0	0	
IA Window Replacement Project	2022-02-23	13,112	287	SL	40	328	328	0	
EA Window Replacement Project	2022-02-23	13,111	287	SL	40	328	0	0	
EA Laptop MK	2022-02-28	1,000	100	SL	5	200	0	0	
IA Water Storage Tank	2023-06-15	5,480	0	SL	5	685	685	0	
IA Network Switches	2023-11-08	23,278	0	SL	5	582	582	0	
EA Network Switches	2023-11-08	23,278	0	SL	5	582	0	0	
IA Network Cabling & Closet Relocation	2023-11-21	9,011	0	SL	5	225	225	0	
EA Network Cabling & Closet Relocation	2023-11-21	9,011	0	SL	5	225	0	0	
EA Childrens Table	2023-03-22	1,503	0	SL	5	263	0	0	
EA Childrens Stools 4	2023-04-17	767	0	SL	5	96	0	0	
Inv Assets Disp 2023-12-31	2021-01-01	25,509	25,015	SL	5	191	191	0	
EA iPad Pro Wifi 256 Educ HPK29TVWFQ	2023-10-02	1,199	0	SL	5	30	0	0	

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: Sid W Richardson Foundation

EIN: 75-6015828

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
Publicly Traded Securities					17,381,004	18,099,223		0	-718,219	0
32242ac Altamesa Blvd DirksRd					2,882,281	29,734		0	2,852,547	0
Publicly Traded Securities					3,678,486	4,380,124		0	-701,638	0
US Treasury Notes					90,201,805	92,303,391		0	-2,101,586	0
US Treasury Notes					29,508,408	28,972,646		0	535,762	0

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Publicly Traded Securities	337,167,866	337,167,866

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

**US Government Securities - End of
Year Book Value:**

**US Government Securities - End of
Year Fair Market Value:**

**State & Local Government
Securities - End of Year Book
Value:**

85,693,515

**State & Local Government
Securities - End of Year Fair
Market Value:**

85,693,515

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Land	1,155,115	0	1,155,115	33,593,095
Furniture & Fixtures	48,443	38,452	9,991	9,991
Building	615,123	259,569	355,554	355,555
Ranch Machinery & Equipment	267,301	240,622	26,679	26,679
Equipment	112,833	19,151	93,682	93,683
Mineral Interests	1,755,846	1,755,766	80	27,309,162
Construction in Progress	19,250	0	19,250	19,250

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
JP Morgan Money Market		53,352,366	53,352,366
PIMCO Fund		1,630,348	1,630,348

TY 2023 IRS 990 e-File Render**Name:** Sid W Richardson Foundation**EIN:** 75-6015828

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture & Fixtures	964,621	842,731	121,890	121,890
Equipment	200,190	86,538	113,652	113,652
Building	7,599,794	4,691,727	2,908,067	2,908,067
Leasehold Improvements	1,102,754	472,382	630,372	630,372
Construction in Progress	19,250	0	19,250	19,250

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal Fees	67,106	35,324	0	40,995

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Art Collection	10,648,737	10,648,737	194,583,750
Museum Digital Images	109,595	109,595	109,595
Misc Other Assets	1,129	1,111	1,111

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Supplies	38,711	6,741	0	31,324
Museum Security	124,445	0	0	124,595
Museum Art Conservation	17,845	0	0	17,845
Museum Exhibits	64,493	0	0	65,760
Museum Education Programs	37,097	0	0	35,267
Dues & Fees	35,887	0	0	35,616
IT Support & Software	48,223	475	0	45,626
Meals	4,975	567	0	2,162
Staff Professional Development	9,194	278	0	8,595
Misc Charitable Support	21,088	0	0	17,500
Misc Expenses	32,164	7,779	0	22,292
Actuarial Loss Retirement Plan	248,814	0	0	0

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Oil & Gas Royalties	8,039,706	8,039,706	0
Misc Oil & Gas	246,334	246,334	0

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Description	Amount
Unrealized Gain on Investments	34,844,917

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Description	Beginning of Year - Book Value	End of Year - Book Value
Deferred Excise Taxes Payable	2,129,011	2,613,355
Accrued Postretirement Benefits	494,621	661,494

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Custodial & Bank Fees	103,325	103,325	0	0
Investment Management Fees	944,966	944,966	0	0
Ad Valorem Tax Consultants	2,165	2,165	0	0
Education Consulting Fees	81,000	0	0	81,000
Museum Public Relations	62,625	0	0	62,818
Museum Advertising	42,479	0	0	44,747
Design Consulting	5,500	1,375	0	4,125

TY 2023 IRS 990 e-File Render

Name: Sid W Richardson Foundation

EIN: 75-6015828

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Ad Valorem Taxes	410,891	410,891	0	0
Excise Taxes	213,368	0	0	0
Deferred Excise Taxes	484,344	0	0	0