

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 LIVINGRY FOUNDATION
A Employer identification number 85-0480537
B Telephone number (see instructions) (415) 561-6400
C If exemption application is pending, check here
D 1. Foreign organizations, check here
D 2. Foreign organizations meeting the 85% test, check here and attach computation
E If private foundation status was terminated under section 507(b)(1)(A), check here
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here
G Check all that apply: Initial return, Initial return of a former public charity, Final return, Amended return, Address change, Name change
H Check type of organization: Section 501(c)(3) exempt private foundation, Section 4947(a)(1) nonexempt charitable trust, Other taxable private foundation
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,091,446
J Accounting method: Cash, Accrual, Other (specify)

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), with a total of 161,851 for 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	40,582	36,121	36,121
	2 Savings and temporary cash investments	62,993	20,521	20,521
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ <u>141,534</u> Less: allowance for doubtful accounts ▶ _____ <u>0</u>	91,534	141,534	141,534
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges		301	301
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	626,635	551,729	551,729
	c Investments—corporate bonds (attach schedule)	206,845	200,820	200,820
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	77,583	84,979	84,979
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	368,355	55,441	55,441	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,474,527	1,091,446	1,091,446	
Liabilities	17 Accounts payable and accrued expenses		600	
	18 Grants payable			
	19 Deferred revenue.			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)	0	2,042	
	23 Total liabilities (add lines 17 through 22).	0	2,642	
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	1,474,527	1,088,804	
	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)	1,474,527	1,088,804		
30 Total liabilities and net assets/fund balances (see instructions)	1,474,527	1,091,446		

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	1,474,527
2 Enter amount from Part I, line 27a	2	-430,874
3 Other increases not included in line 2 (itemize) ▶ _____	3	45,151
4 Add lines 1, 2, and 3	4	1,088,804
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	1,088,804

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 BIOCHAR ENGINEERING	P		2023-12-31
b GROWSTONE INC	P		2023-12-31
c IBERDROLA SA	P	2021-11-12	2023-01-05
d BECTON DICKINSON	P	2018-10-11	2023-01-05
e BLOOM ENERGY CORP CL	P	2020-08-28	2023-01-05
FIS GLOBAL	P	2022-04-11	2023-01-05
FIS GLOBAL	P	2016-03-24	2023-01-05
FIRST REPUBLIC BANK	P	2014-09-04	2023-01-05
LKQ CORP	P	2010-09-14	2023-01-05
THERMO FISHER SCIENT	P	2011-09-01	2023-01-05
AMAZON COM	P	2014-04-10	2023-01-13
TRANE TECHNOLOGIES	P	2015-04-22	2023-01-31
FIS GLOBAL	P	2016-03-24	2023-03-13
FIRST SOLAR INC COM	P	2019-02-05	2023-03-13
FIRST REPUBLIC BANK	P	2014-09-04	2023-03-17
COMCAST CL A	P	2015-07-21	2023-05-10
MONDELEZ INTERNATION	P	2018-12-31	2023-06-15
APPLE INC	P	2011-01-07	2023-06-29
AVALON BAY REIT	P	2020-05-14	2023-06-29
FIDELITY OVERSEAS FO	P	2015-02-26	2023-06-29
MICROSOFT CORP	P	2022-03-07	2023-06-29
NVR INC	P	2020-11-30	2023-06-29
IBERDROLA SA FOR	P	2021-11-12	2023-06-30
BERKSHIRE HATHAWAY C	P	2015-10-22	2023-06-30
COMCAST CL A	P	2015-07-21	2023-06-30
LOWE'S COMPANIES INC	P	2013-08-19	2023-06-30
TJX COMPANIES INC	P	2022-04-25	2023-06-30
VISA	P	2013-06-19	2023-06-30
WASTE MANAGEMENT INC	P	2018-06-22	2023-06-30
BORG WARNER AUTOMOLL	P	2021-02-26	2023-07-07
PHINIA INC	P	2021-02-26	2023-07-07
QUANTA SERVICES	P	2021-07-09	2023-08-16
BERKSHIRE HATHAWAY C	P	2015-10-22	2023-08-23
TJX COMPANIES INC	P	2022-04-25	2023-08-23
ALPHABET CLASS A	P	2010-01-22	2023-08-28
FIDELITY OVERSEAS FO	P	2015-02-26	2023-08-28
MICROSOFT CORP	P	2022-03-07	2023-08-28
SOLAREEDGE TECHNOLOG1	P	2023-06-28	2023-09-13
VERALTO CORP	P	2016-12-23	2023-10-04
SOLAREEDGE TECHNOLOG1	P	2023-08-11	2023-11-06
BECTON DICKINSON	P	2018-10-11	2023-11-10
DIAGEO PIE ADR FOR	P	2023-05-22	2023-11-10
DIAGEO PIE ADR FOR	P	2023-05-18	2023-11-10
APPLE INC	P	2011-01-07	2023-12-18
PROGRESSIVE CORP	P	2019-04-25	2023-12-18
VANGUARD SHORT-TERM	P	2021-05-03	2023-12-18
CAPITAL GAINS DIVIDENDS	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		10,229	-10,229
b		317,873	-317,873
c	4,667	4,648	19
d	5,125	4,692	433
e	3,802	3,270	532
	3,409	5,109	-1,700
	3,409	3,129	280
	3,030	1,229	1,801
	2,693	502	2,191
	5,594	547	5,047
	10,792	1,760	9,032
	8,940	2,618	6,322
	7,666	9,388	-1,722
	10,156	2,461	7,695
	2,807	4,915	-2,108
	3,976	3,208	768
	7,342	3,984	3,358
	18,978	1,196	17,782
	4,648	3,767	881
	5,000	3,604	1,396
	5,036	4,239	797
	6,213	4,026	2,187
	3,272	2,905	367
	6,821	2,730	4,091
	10,402	8,021	2,381
	5,628	1,094	4,534
	4,235	3,152	1,083
	5,935	1,149	4,786
	4,320	2,049	2,271
	13,531	11,577	1,954
	1,978	1,971	7
	5,044	2,246	2,798
	3,534	1,365	2,169
	4,499	3,152	1,347
	11,087	1,194	9,893
	3,000	2,207	793
	8,060	7,065	995
	3,647	6,441	-2,794
	52	19	33
	1,783	4,406	-2,623
	9,350	9,383	-33
	7,077	8,920	-1,843
	3,538	4,441	-903
	14,641	897	13,744
	3,881	1,890	1,991
	11,970	12,940	-970
	218		218

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			-10,229
b			-317,873
c			19
d			433
e			532
			-1,700
			280
			1,801
			2,191
			5,047
			9,032
			6,322
			-1,722
			7,695
			-2,108
			768
			3,358
			17,782
			881
			1,396
			797
			2,187
			367
			4,091
			2,381
			4,534
			1,083
			4,786
			2,271
			1,954
			7
			2,798
			2,169
			1,347
			9,893
			793
			995
			-2,794
			33
			-2,623
			-1,843
			-903
			13,744
			1,991
			-970
			218

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	-226,822
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3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	{ If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 }	3	
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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)				
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)				0
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				0
3 Add lines 1 and 2.				0
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				0
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-				0
6 Credits/Payments:				
a 2023 estimated tax payments and 2022 overpayment credited to 2023	6a		0	
b Exempt foreign organizations—tax withheld to source	6b		0	
c Tax paid with application for extension of time to file (Form 8868)	6c		0	
d Backup withholding erroneously withheld	6d		0	
7 Total credits and payments. Add lines 6a through 6d	7		0	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8		0	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		0	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10			
11 Enter the amount of line 10 to be: Credited to 2024 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11			

Part VI-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

Table with columns Yes, No and row 1a

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

Table with columns Yes, No and row 1b

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year?

Table with columns Yes, No and row 1c

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

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

Table with columns Yes, No and row 2

2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.

Table with columns Yes, No and row 3

3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes.

Table with columns Yes, No and row 4a

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

Table with columns Yes, No and row 4b

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

Table with columns Yes, No and row 5

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

Table with columns Yes, No and row 6

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: By language in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

Table with columns Yes, No and row 7

7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV.

Table with columns Yes, No and row 8a

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

Table with columns Yes, No and row 8b

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation.

Table with columns Yes, No and row 9

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII.

Table with columns Yes, No and row 10

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

Table with columns Yes, No and row 11

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.

Table with columns Yes, No and row 12

12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.

Table with columns Yes, No and row 13

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

Table with columns Yes, No and row 14

14 The books are in care of THE ORGANIZATION Telephone no. (415) 561-6400 Located at 525 CAMINO MILITAR SANTA FE NM 87501 ZIP+4

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year. 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.

Table with columns Yes, No and row 16

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

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

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

	Yes	No
1a(1)		No
1a(2)		No
1a(3)	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...
(2) Influence the outcome of any specific public election...
(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...
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes...
b If any answer is "Yes" to 5a(1)-(5); did any of the transactions fail to qualify under the exceptions...
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...
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
6b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?
7b 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?

Table with 3 columns: Question ID, Yes, No. Rows include 5a(1) through 8.

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

Table with 5 columns: (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. Includes entries for Andrew Ungerleider, James D Gollin, and Drummond Pike.

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

Table with 5 columns: (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. All entries are NONE.

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

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

0

Part VIII- Summary of Direct Charitable Activities

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

Expenses

1

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	882,408
b	Average of monthly cash balances.	1b	66,536
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	948,944
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d.	3	948,944
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	14,234
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	934,710
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	46,736

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	46,736
2a	Tax on investment income for 2022 from Part V, line 5.	2a	
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	4,935
c	Add lines 2a and 2b.	2c	4,935
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	41,801
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	41,801
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	41,801

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	161,851
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.	4	161,851

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				41,801
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			0	
b Total for prior years: 20 ____, 20 ____, 20 ____		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018.				92,075
b From 2019.				77,437
c From 2020.				86,500
d From 2021.				88,533
e From 2022.				156,214
f Total of lines 3a through e.	500,759			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ <u>161,851</u>				
a Applied to 2022, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2023 distributable amount				41,801
e Remaining amount distributed out of corpus	120,050			
5 Excess distributions carryover applied to 2023. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	620,809			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)	92,075			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	528,734			
10 Analysis of line 9:				
a Excess from 2019	77,437			
b Excess from 2020	86,500			
c Excess from 2021.	88,533			
d Excess from 2022	156,214			
e Excess from 2023	120,050			

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)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed

Table with 5 columns: (a) 2023, (b) 2022, (c) 2021, (d) 2020, (e) Total. Rows include 2a, 2b, 2c, 2d, 2e, 3, 3a, 3b, 3c.

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 email address of the person to whom applications should be addressed:

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

c Any submission deadlines:

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

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> CENTER FOR CIVIC POLICY PO BOX 27616 ALBUQUERQUE,NM 87102	NONE	501(C)(3)	GENERAL SUPPORT	2,500
INSTITUTE OF ECOTECHNICS 1 BLUEBIRD COURT SANTA FE,NM 87508	NONE	501(C)(3)	FUNDING BIOSPHERIC STUDIES PROGRAM DEVELOPMENT	1,000
NM FOUNDATIONFRIENDS OF TONY PRICE 8 CALLE MEDICO SANTA FE,NM 87505	NONE	501(C)(3)	GENERAL SUPPORT	1,500
SANTA FE WATERSHED ASSOCIATION 1413 SECOND ST SUITE 3 SANTA FE,NM 87505	NONE	501(C)(3)	ADOPT-THE-RIVER SPONSORSHIP	1,000
ST VINCENT HOSPITAL FOUNDATION 455 ST MICHAELS DRICE 2ND FLOOR SANTA FE,NM 87505	NONE	501(C)(3)	GENERAL SUPPORT	5,000
NEW MEXICO DANCE COALITION 369 MONTEZUMA AVE 270 SANTA FE,NM 87501	NONE	501(C)(3)	GENERAL SUPPORT	2,000
INSTITUTE FOR REGIONAL EDUCATION PO BOX 404 SANTA FE,NM 87504	NONE	501(C)(3)	GENERAL SUPPORT	3,000
USTA FOUNDATION INCORPORATED 2500 WESTCHESTER AVENUE PURCHASE,NY 10577	NONE	501(C)(3)	SUPPORT FOR USTA EDUCATION IN HONOR OF ELEANOR BRENNER AND FIRST SERVE	10,000
LOVE SERVE REMEMBER FOUNDATION 226 W OJAI AVE STE 101 531 OJAI,CA 93023	NONE	501(C)(3)	GENERAL SUPPORT	10,000
ALLIANCE FOR THE EARTH PO BOX 8031 SANTA FE,NM 87504	NONE	501(C)(3)	GENERAL SUPPORT	1,000
ANGELICA FOUNDATION 1688 CERRO GORDO RD SANTA FE,NM 87501	NONE	501(C)(3)	GENERAL SUPPORT	1,000
ROOTS OF LOVE 525 CAMINO MILITAR SANTA FE,NM 87501	NONE	501(C)(3)	HELPING IN REUNITING BIRTH PARENT TO ADOPTEES FROM CHINA	2,500
READING QUEST READING QUEST 369 SANTA FE,NM 87501	NONE	501(C)(3)	GENERAL SUPPORT	2,500
BACK FROM THE BRINK FOUNDATION CORPORATION 150 E SONTERRA BLVED STE 170 SAN ANTONIO,TX 78258	NONE	501(C)(3)	GENERAL SUPPORT	1,000
Total			3a	44,000
b <i>Approved for future payment</i>				

Total ▶ 3b

0

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 FROM 990-T UBIT
b
c
d
e

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

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.)

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: LIVINGRY FOUNDATION

EIN: 85-0480537

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	18,252	9,126		9,126

TY 2023 IRS 990 e-File Render

Name: LIVINGRY FOUNDATION

EIN: 85-0480537

Identifier	Return Reference	Explanation
ACTIVITES WITH DISQUALIFIED PERSONS:	FORM 990-PF, PART VII-B	THE PRESIDENT WAS REIMBURSED A TOTAL OF \$5,251 FOR TRAVEL & OTHER EXPENSES INCURRED ON BEHALF OF THE FOUNDATION.

TY 2023 IRS 990 e-File Render

Name: LIVINGRY FOUNDATION

EIN: 85-0480537

Name of Bond	End of Year Book Value	End of Year Fair Market Value
DODGE & COX INCOME	72,665	72,665
JP MORGAN BACKED SEC CLASS I	61,160	61,160
VANGUARD SHORT TERM INVMT GRADE ADMIRAL	66,995	66,995

TY 2023 IRS 990 e-File Render**Name:** LIVINGRY FOUNDATION**EIN:** 85-0480537

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALPHABET INC CAP STK CL A	38,415	38,415
AMAZON.COM INC	37,985	37,985
AON PLC SHS CL A COM	7,276	7,276
APPLE INC COM	43,319	43,319
BERKSHIRE HATHAWAY INC COM	17,833	17,833
BLOOM ENERGY CORP COM	4,440	4,440
BROADCOM INC COM	33,488	33,488
CVS HEALTH CORPORATION	11,844	11,844
DANAHER CORPORATION COM	11,567	11,567
DISNEY WALT CO COM	9,029	9,029
FIDELITY OVERSEAS	38,515	38,515
FIRST SOLAR INC	8,614	8,614
IBERDOLA SA EURO .75 ISIN	9,834	9,834
LINDE PLC COM EURO0.001	12,321	12,321
LKQ CORP	11,947	11,947
LOWES COMPANIES INC COM	11,127	11,127
MICROSOFT CORP	56,406	56,406
MONDELEZ INTL INC COM	18,108	18,108
MONTROSE ENVIRONMENTAL GROUP	2,410	2,410
NVR INC COM	14,001	14,001
PNC FINANCIAL SERVICES GROUP	11,614	11,614
PROGRESSIVE CORP COM	11,946	11,946
QUANTA SERVICES COM	10,790	10,790
REXEL EUR5 ISIN	8,209	8,209
THERMO FISHER SCIENTIFIC INC	10,616	10,616
TJX COMPANIES INC	9,381	9,381
TRIMBLE INC COM	7,980	7,980
TYLER TECHNOLOGIES	6,272	6,272
ULTA BEAUTY INC COM	12,250	12,250
VALMONT INDUSSTRIES INC	7,005	7,005
VISA INC	19,526	19,526
WASTE MANAGEMENT INC	8,955	8,955
APTIV PLC COM	4,486	4,486
MERCK &CO. INC COM	13,627	13,627
PALO ALTO NETWORKS INC COM	4,423	4,423
VERALTO CORP COM SHS	6,170	6,170

TY 2023 IRS 990 e-File Render**Name:** LIVINGRY FOUNDATION**EIN:** 85-0480537

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
AMERICAN TOWER CORP COM	FMV	10,794	10,794
AVALONBAY COMMUNITIES INC COM	FMV	9,361	9,361
HANNON ARMSTRONG SUSTAINABLE	FMV	6,895	6,895
ISHARES PHLX SEMICONDUCTOR ETF	FMV	23,044	23,044
ISHARES TR BIOTECH	FMV	13,585	13,585
KORNIT DIGITAL LTD ORD	FMV	958	958
VANECK ETF TRUST PHARMACEUTCL ETF	FMV	20,342	20,342

TY 2023 IRS 990 e-File Render

Name: LIVINGRY FOUNDATION

EIN: 85-0480537

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
BIOCHAR ENGINEERING CORP	10,229	0	0
GROWSTONE LLC PREF SERIES	115,000	0	0
GROWSTONE LLC PRE SERIES B	83,905	0	0
GROWSTONE LLC PREF SERIES C	118,968	0	0
SANTA FE TORTILLA	-13,281	-8,093	-8,093
JLS FUND 1 LP	53,534	53,534	53,534
TEECCINO	0	10,000	10,000

TY 2023 IRS 990 e-File Render

Name: LIVINGRY FOUNDATION

EIN: 85-0480537

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MEETINGS	11,390	0		11,390
PROGRAM EXPENSE	2,100	0		2,100
MEMBERSHIP & DUES	1,500	0		1,500
ONLINE PROCESSING FEES	115	58		58
BANK CHARGES	74	37		37
POSTAGE & DELIVERY	51	0		51
RENT, PARKING, UTILITIES	3	0		3

TY 2023 IRS 990 e-File Render

Name: LIVINGRY FOUNDATION

EIN: 85-0480537

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FROM 990-T UBIT	24,498		24,498

TY 2023 IRS 990 e-File Render

Name: LIVINGRY FOUNDATION

EIN: 85-0480537

Description	Amount
UNREALIZED GAIN/LOSS	45,151

TY 2023 IRS 990 e-File Render

Name: LIVINGRY FOUNDATION

EIN: 85-0480537

Description	Beginning of Year - Book Value	End of Year - Book Value
WELLS FARGO CREDIT CARD	0	2,000
PAYROLL LIABILITIES	0	42

TY 2023 IRS 990 e-File Render

Name: LIVINGRY FOUNDATION

EIN: 85-0480537

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	9,141	9,141		0
PAYROLL PROCESSING FEES	164	54		110
OTHER PROFESSIONAL FEES	55,854	27,927		27,927

TY 2023 IRS 990 e-File Render

Name: LIVINGRY FOUNDATION

EIN: 85-0480537

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	5,508	1,818		3,690
FOREIGN TAXES ON INVESTMENT INCOME	136	136		0
EXCISE TAXES	11,491	0		0