

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: THE PACKARD HUMANITIES INSTITUTE. A Employer identification number: 94-3038401. B Telephone number: (650) 948-0150. C If exemption application is pending, check here. D 1. Foreign organizations, check here. 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. H Check type of organization: Section 501(c)(3) exempt private foundation. J Accounting method: Accrual.

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 the 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; 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		4,096	4,096
	2 Savings and temporary cash investments	263,326,288	245,707,597	245,707,597
	3 Accounts receivable ▶ <u>1,480,869</u>			
	Less: allowance for doubtful accounts ▶ _____	1,958,996	1,480,869	1,480,869
	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	4,308,144	4,547,671	4,547,671
	9 Prepaid expenses and deferred charges	16,364	21,020	21,020
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	83,755,739	101,623,168	101,623,168
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____			
Less: accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	284,561,511	307,464,283	307,464,283	
14 Land, buildings, and equipment: basis ▶ <u>199,141,541</u>				
Less: accumulated depreciation (attach schedule) ▶ <u>37,838,571</u>	164,882,725	161,302,970	161,302,970	
15 Other assets (describe ▶ _____)	31,034,031	31,034,382	31,034,382	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	833,843,798	853,186,056	853,186,056	
Liabilities	17 Accounts payable and accrued expenses	945,230	881,254	
	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 ▶ _____)	1,377,284	1,835,025	
	23 Total liabilities (add lines 17 through 22)	2,322,514	2,716,279	
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	831,521,284	850,469,777	
	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)	831,521,284	850,469,777		
30 Total liabilities and net assets/fund balances (see instructions)	833,843,798	853,186,056		

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	831,521,284
2 Enter amount from Part I, line 27a	2	-11,437,637
3 Other increases not included in line 2 (itemize) ▶ _____	3	30,386,130
4 Add lines 1, 2, and 3	4	850,469,777
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	850,469,777

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PUBLICLY TRADED SECURITIES				
b JP MORGAN CHINA - DISTRIBUTIONS IN EXCESS OF BASIS		P	2012-04-27	2023-12-31
c DISPOSITION OF PEG DIGITAL GROWTH FUND OFFSHORE LP		P	2011-03-25	2023-01-31
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 1,305,513		990,419	315,094	
b 152,568			152,568	
c		3,329,678	-3,329,678	
d				
e				
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))
(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			315,094	
b			152,568	
c			-3,329,678	
d				
e				
2 Capital gain net income or (net capital loss)		{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2 -2,862,016
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

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	171,538
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	171,538
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	171,538
6 Credits/Payments:			
a 2023 estimated tax payments and 2022 overpayment credited to 2023	6a 191,131		
b Exempt foreign organizations—tax withheld at source	6b 0		
c Tax paid with application for extension of time to file (Form 8868)	6c 100,000		
d Backup withholding erroneously withheld	6d 0		
7 Total credits and payments. Add lines 6a through 6d	7 291,131		
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	10 119,593		
11 Enter the amount of line 10 to be: Credited to 2024 estimated tax Refunded	11 0		

Part VI-A Statements Regarding Activities

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

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. ▶ \$ 0 **(2)** On foundation managers. ▶ \$ 0

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0

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)
 ▶ CA, MA, VA

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.PACKHUM.ORG

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

14 The books are in care of ▶ THE FOUNDATION Telephone no. ▶ (650) 948-0150
 Located at ▶ 300 SECOND STREET LOS ALTOS CA ZIP+4 ▶ 94022

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* ▶ UK

	Yes	No
16	Yes	

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)	Yes	
5a(5)		No
5b		No
5d	Yes	
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
DAVID W PACKARD PHI 300 SECOND STREET LOS ALTOS, CA 94022	PRES/CHAIR/DIR 30.00	0	0	0
BARBARA P WRIGHT PHI 300 SECOND STREET LOS ALTOS, CA 94022	SECRETARY 1.00	0	0	0
SI WHITE PHI 300 SECOND STREET LOS ALTOS, CA 94022	TREASURER/CFO 25.00	165,033	67,400	0
WALTER B HEWLETT PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
WILLIAM A JOHNSON PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
CHRISTOPH J WOLFF PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
RICHARD HODGES PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
ARIANNA PACKARD MARTELL PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0
WOODLEY PACKARD PHI 300 SECOND STREET LOS ALTOS, CA 94022	DIRECTOR 1.00	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WILKINS POE 300 SECOND ST LOS ALTOS, CA 94022	EDITOR-PROGRAMMER 40.00	206,903	76,277	0
PATRICK LOUGHNEY 26155 ROCKWELL CANYON ROAD SANTA CLARITA, CA 91355	DIRECTOR 40.00	203,773	33,946	0
MATTHEW YOW 26155 ROCKWELL CANYON ROAD SANTA CLARITA, CA 91355	FACILITY MANAGER 40.00	160,923	65,285	0
BRUCE NICHOLS 26155 ROCKWELL CANYON ROAD SANTA CLARITA, CA 91355	PROGRAM MANAGER 40.00	146,415	68,436	0
PAUL CORNEILSON 11-A MT AUBURN STREET CAMBRIDGE, MA 02138	MANAGING EDITOR 40.00	142,677	61,051	0
Total number of other employees paid over \$50,000.				27

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
JP MORGAN CHASE BANK NA 270 PARK AVENUE NEW YORK, NY 100172014	INVESTMENT SERVICES	767,871
INTERPLAN SECONDA SRL VIA MICHELANGELO SCHIPA 100 NAPOLI 80122 IT	ARCHITECT	557,676
IWAMOTOSCOTT ARCHITECTURE LLP 128 TEXAS STREET SAN FRANCISCO, CA 94107	ARCHITECT	458,403
SOPHILOS EE 40 FRAGKOPOULOU KIFISSIA GR	DATA RECORDING SYSTEM	201,689
DEAN BORNSTEIN 97 GOVERNOR MATTOCKS RD BARNET, VT 05821	BOOK DESIGN OF CPEB AND JCB	122,028

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 HUMANITIES DATA BASE PROJECTS: SUPPORT FOR THE PRESERVATION, EDITING, AND DISEMINATION OF HISTORICAL MUSIC (INCLUDING C.P.E. BACH AND MOZART) AND DOCUMENTS (INCLUDING GREEK INSCRIPTION)	1,815,158
2 CONSTRUCTION COSTS AND OPERATING COSTS FOR THE PHI STOA IN SANTA CLARITA, CA	3,168,728
3 FILM PRESERVATION AND DIGITIZATION PROJECTS	3,210,758
4 COSTS FOR THE PROJECT AT THE HERCULANEUM	1,429,019

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	91,648,196
b	Average of monthly cash balances.	1b	257,648,083
c	Fair market value of all other assets (see instructions).	1c	298,621,493
d	Total (add lines 1a, b, and c).	1d	647,917,772
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	647,917,772
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	9,718,767
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	638,199,005
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	31,909,950

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	31,909,950
2a	Tax on investment income for 2022 from Part V, line 5.	2a	171,538
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	171,538
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	31,738,412
4	Recoveries of amounts treated as qualifying distributions.	4	14,436
5	Add lines 3 and 4.	5	31,752,848
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	31,752,848

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	19,777,391
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	211,082
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	29,500,000
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	49,488,473

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				31,752,848
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			28,955,874	
b Total for prior years: 20 ____, 20 ____, 20 ____		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018.				
b From 2019.				
c From 2020.				
d From 2021.				
e From 2022.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ <u>49,488,473</u>				
a Applied to 2022, but not more than line 2a			28,955,874	
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				20,532,599
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2023. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				11,220,249
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9:				
a Excess from 2019				
b Excess from 2020				
c Excess from 2021.				
d Excess from 2022				
e Excess from 2023				

Part 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 columns: Tax year (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> AMERICAN FRIENDS OF LOVEITALY 671 MENLO OAKS DRIVE MENLO PARK, CA 94025		P C	CHARITABLE DONATION	30,000
AMERICAN SCHOOL OF CLASSICAL STUDIES IN ATHENS 52 SOUIDIAS STREET ATHENS 106 76 GR		P C	SUPPORT OF THE AGORA EXCAVATIONS PROJECT	2,500,000
AMERICAN SOCIETY OF POPYROLOGISTS MC 90103 CLASSICS DUKE UNIVERSITY DURHAM, NC 277080103		P C	CHARITABLE DONATION	30,000
DIPYLON SOCIETY 6 OMIROU ST ATHENS 105 64 GR		N C	MAPPING ANCIENT ATHENS	280,000
GEORGE EASTMAN MUSEUM MOTION PICTURE DEPARTMENT ROCHESTER, NY 14607		P C	SUPPORT OF FILM PRESERVATION PROJECT	210,000
GEORGE EASTMAN MUSEUM MOTION PICTURE DEPARTMENT ROCHESTER, NY 14607		P C	SUPPORT OF FUNDING FOR 6 STAFF POSITIONS FOR 2023-2024	378,277
GEORGE EASTMAN MUSEUM MOTION PICTURE DEPARTMENT ROCHESTER, NY 14607		P C	SUPPORT OF FUNDING FOR 3 NEW NITRATE VAULTS	575,000
INSTITUTO PACKARD PER I BENI CULTURALI VIA PALO 25 PISA 56126 IT		N C	SUPPORT THE REGULAR ACTIVITIES OF HERCULANEUM PROJECT	1,300,000
INSTITUTO PACKARD PER I BENI CULTURALI VIA PALO 25 PISA 56126 IT		N C	SUPPORT LAND PURCHASE ACTIVITIES - SET ASIDE	330,000
INSTITUTO PACKARD PER I BENI CULTURALI VIA PALO 25 PISA 56126 IT		N C	SUPPORT AUDITING, ADMINISTRATIVE AND LEGAL COSTS	272,000
INSTITUTO PACKARD PER I BENI CULTURALI VIA PALO 25 PISA 56126 IT		N C	SUPPORT THE VIA MARE PROJECT	250,000
INTERNATIONAL MOZARTEUM FOUNDATION SCHWARZSTRASSE 27 SALZBURG 5020 AU		N C	SUPPORT OF STAFF SALARIES AND GENERAL EXPENSES OF THE DIGITAL MOZART EDITION	1,100,000
NORTH CAROLINA BOTANICAL GARDEN FOUNDATION 100 OLD MASON FARM ROAD		P C	CHARITABLE DONATION	15,000

CHAPEL HILL, NC 27517				
OPERA SAN JOSE 2149 PARAGON DRIVE SAN JOSE, CA 95131		PC	SUPPORT OF THE STREAMING OF ALMA DEUTSCHER'S OPERA CINDERELLA	65,000
OPERA SAN JOSE 2149 PARAGON DRIVE SAN JOSE, CA 95131		PC	SUPPORT OF GENERAL OPERATIONS	500,000
STANFORD THEATRE FOUNDATION 300 SECOND STREET LOS ALTOS, CA 94022		POF	CONTINUED SUPPORT INCLUDING ROOF REPLACEMENT	1,250,000
STANFORD THEATRE FOUNDATION 300 SECOND STREET LOS ALTOS, CA 94022		POF	RENOVATION OF HVAC SYSTEM	750,000
Total			▶ 3a	9,835,277
b <i>Approved for future payment</i>				
INSTITUTO PACKARD PER I BENI CULTURALI VIA PALO 25 PISA 56126 IT		NC	CONSTRUCTION OF TWO BUILDINGS TO BE UTILIZED BY THE ARCHAEOLOGICAL PARK OF HERCULANEUM, A UNESCO WORLD HERITAGE SITE - SET ASIDE	29,170,000
Total			▶ 3b	29,170,000

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: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AUDIT/TAX SERVICES	137,434	4,123	0	117,694

Name: 94-3038401 THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Reports by Grantee	Date of Verification
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG 04109 GM	2013-03-01	229,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	229,000	NONE	2014,2015,2016,2017,2018,2019,2020,2021,2022,2023	
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG 04109 GM	2015-04-06	110,500	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	104,773	NONE	2016,2017,2018,2019,2020,2021,2022,2023	
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG 04109 GM	2016-07-20	117,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	117,000	NONE	2017,2018,2019,2020,2021,2022,2023	
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG 04109 GM	2017-04-19	153,800	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	112,134	NONE	2018,2019,2020,2021,2022,2023	
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG 04109 GM	2018-05-01	140,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	135,567	NONE	2018,2019,2020,2021,2022,2023	
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG 04109 GM	2020-05-04	140,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	126,547	NONE	2021,2022,2023	
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG 04110 GM	2013-03-06	155,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	73,148	NONE	2022	
BACH ARCHIVE LEIPZIG	THOMASKIRCHHOF 15-16 LEIPZIG 04111 GM	2021-11-19	40,000	RESEARCH, PUBLICATIONS, LIBRARY, MUSEUM AND GENERAL OPERATIONS	40,000	NONE	2022,2023	
BRITISH SCHOOL OF ATHENS	52 SOULDIAS STREET ATHENS GR	2022-12-19	2,300,000	RENOVATION OF RSA KHNOSSOS RESEARCH CENTRE	92,572	NONE	2023	
INTERNATIONAL MOZARTIUM FOUNDATION	SCHWARZSTRASSE 21 SALZBURG 5020 AU	2001-11-30	3,000,000	SUPPORT FOR ENDOWMENT OF A DIGITAL EDITION OF MOZART	269,839	NONE	2002-2011,2012,2013,2014,2015,2016,2017,2018,2019,2020,2021,2022,2023	
INTERNATIONAL MOZARTIUM FOUNDATION	SCHWARZSTRASSE 21 SALZBURG 5020 AU	2019-06-04	2,000,000	SUPPORT FOR CREATION OF A DIGITAL EDITION OF MOZART	2,000,000	NONE	2019,2020,2021,2022,2023	
INTERNATIONAL MOZARTIUM FOUNDATION	SCHWARZSTRASSE 21 SALZBURG 5020 AU	2021-12-20	1,700,000	SUPPORT FOR CREATION OF A DIGITAL EDITION OF MOZART	1,700,000	NONE	2022,2023	
INTERNATIONAL MOZARTIUM FOUNDATION	SCHWARZSTRASSE 21 SALZBURG 5020 AU	2023-07-20	1,100,000	SUPPORT FOR CREATION OF A DIGITAL EDITION OF MOZART	0	NONE	NOT YET DUE	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2018-10-29	205,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	205,000	NONE	2018,2019,2020,2021,2022,2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2019-08-16	530,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	530,000	NONE	2019,2020,2021,2022,2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-01-10	750,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	750,000	NONE	2021,2022,2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-07-27	555,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	555,000	NONE	2021,2022,2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-07-27	130,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	130,000	NONE	2021,2022,2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-12-20	994,400	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	994,400	NONE	2021,2022,2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-12-20	406,800	FUNDS TO PURCHASE LAND AND BUILDINGS ADJACENT TO THE ARCHAEOLOGICAL SITE OF HERCULANEUM	406,800	NONE	2021,2022,2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2021-12-20	156,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	156,000	NONE	2021,2022,2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2022-12-26	540,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	438,570	NONE	2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2022-12-27	880,000	CONSERVATION AND RELATED ACTIVITIES AT HERCULANEUM	866,591	NONE	2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2023-03-03	140,000	SUPPORT AUDITING, ADMINISTRATIVE AND LEGAL COSTS	100,497	NONE	2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2023-12-22	132,000	SUPPORT AUDITING, ADMINISTRATIVE AND LEGAL COSTS	0	NONE	2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2023-12-22	1,300,000	SUPPORT THE REGULAR ACTIVITIES OF HERCULANEUM PROJECT	0	NONE	2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2023-12-22	330,000	SUPPORT LAND PURCHASE ACTIVITIES	0	NONE	2023	
ISTITUTO PACKARD PER I BENI CULTURALI	VIA PALO 25 PISA 56126 IT	2023-12-22	250,000	SUPPORT THE VIA MARE PROJECT	0	NONE	2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2022-03-29	175,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	175,000	NONE	2022,2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2022-05-16	200,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	200,000	NONE	2022,2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2022-07-18	150,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	150,000	NONE	2022,2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2022-07-18	250,000	STANFORD THEATRE BUILDING REHABILITATION	250,000	NONE	2022,2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2022-11-07	200,000	STANFORD THEATRE BUILDING REHABILITATION	200,000	NONE	2022,2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2022-11-17	200,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	200,000	NONE	2022,2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2022-12-26	500,000	STANFORD THEATRE BUILDING REHABILITATION	500,000	NONE	2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2022-12-26	300,000	STANFORD THEATRE GENERAL OPERATING EXPENSES	300,000	NONE	2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2023-06-07	1,250,000	STANFORD THEATRE BUILDING REHABILITATION	1,250,000	NONE	2023	
STANFORD THEATRE FOUNDATION	300 SECOND STREET LOS ANGELES, CA 90031	2023-10-26	750,000	STANFORD THEATRE BUILDING REHABILITATION	750,000	NONE	2023	
THE CYPRUS INSTITUTE	20 KONSTANTINOU KINGS ROAD NICOSIA CY	2020-09-16	75,000	SUPPORT OF RESEARCH FOR KINGS' MONUMENTS PROJECT	75,000	NONE	2020,2021,2022,2023	
UNIVERSITY OF CAMBRIDGE	TRINITY LANE CAMBRIDGE UK	2020-09-16	75,000	SUPPORT OF RESEARCH FOR KINGS' MONUMENTS PROJECT	75,000	NONE	2020,2021,2022,2023	
OXFORD UNIVERSITY	WELLINGTON SQUARE OXFORD OXFORDSHIRE OX1 2JD OXFORD UK	2021-12-20	420,000	SUPPORT THE CULTURES OF KNOWLEDGE PROJECT	335,679	NONE	2023	
OXFORD UNIVERSITY	WELLINGTON SQUARE OXFORD OXFORDSHIRE OX1 2JD OXFORD UK	2022-12-14	420,000	SUPPORT THE CULTURES OF KNOWLEDGE PROJECT	0	NONE	2023	
DIPYLON SOCIETY	6 OMIROU ST ATHENS 105 64 GR	2023-09-04	280,000	MAPPING ANCIENT ATHENS	0	NONE	NOT YET DUE	

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Identifier	Return Reference	Explanation
	FORM 990-PF, PART VI-B, LINE 1A(3) AND 1A(4)	THE LAW FIRM OF FINCH MONTGOMERY WRIGHT PC, 350 CAMBRIDGE AVENUE, SUITE 175, PALO ALTO, CA 94306, WAS PAID \$27,650 FOR LEGAL SERVICES AND REIMBURSEMENT OF RELATED EXPENSES TO THE FOUNDATION IN 2023. BARBARA P. WRIGHT IS AN OFFICER, SECRETARY OF THE FOUNDATION, AND IS A PARTNER OR OWNER OF THE LAW FIRM. SHE RECEIVES NO FEES FOR SERVICES IN HER CAPACITY AS AN OFFICER. THE BOARD APPROVED, BY RESOLUTION, COMPENSATION FOR MRS. WRIGHT'S SERVICES, AND THE REASONABLENESS OF THE BILLING RATES. MRS. WRIGHT IS NOT A MEMBER OF THE BOARD AND CANNOT VOTE.
STATEMENT REGARDING CONTROLLED ENTITIES	FORM 990-PF, PART VII-A, LINE 11	ISITUTO PACKARD PER I BENI CULTURALIVIA PASQUALE PAOLI, 25PISA PL, ITALY 56126AMOUNT OF GRANT TRANSFERRED \$0EXCESS BUSINESS HOLDINGS NO
TANGIBLE PROPERTY REGULATIONS		SECTION 1.263(A)-1(F) DE MINIMIS SAFE HARBOR ELECTIONTAXPAYER IS MAKING THE DE MINIMIS SAFE HARBOR ELECTION UNDER TREAS. REG. 1.263(A)-1(F) FOR ALL ELIGIBLE AMOUNTS PAID OR INCURRED DURING THE TAXABLE YEAR.SECTION 1.263(A)-3(N) CAPITALIZATION ELECTIONTAXPAYER HEREBY ELECTS TO CAPITALIZE REPAIR AND MAINTENANCE COSTS UNDER TREAS. REG. 1.263(A)-3(N). THE COSTS WERE INCURRED DURING THE TAXABLE YEAR IN THE ELECTING TAXPAYER'S TRADE OR BUSINESS AND THE ELECTING TAXPAYER TREATS SUCH COSTS AS CAPITAL EXPENDITURES ON ITS BOOKS AND RECORDS.

TY 2023 IRS 990 e-File Render**Name:** THE PACKARD HUMANITIES INSTITUTE**EIN:** 94-3038401

Name of Stock	End of Year Book Value	End of Year Fair Market Value
HEWLETT PACKARD CO	17,140,769	17,140,769
EXCHANGE TRADED FUNDS	62,756,412	62,756,412
HEWLETT PACKARD ENTERPRISE	9,672,657	9,672,657
DXC TECHNOLOGY	2,836,795	2,836,795
AMEX EXPLORATION INC	1,033,416	1,033,416
ARIANNE PHOSPHATE INC	392,246	392,246
ARIZONA METALS CORP	1,840,537	1,840,537
GROUP ELEVEN RES CORP	312,288	312,288
K92 MINING INC	2,239,240	2,239,240
METALLA ROYALTY & STREAMING	610,998	610,998
NORTHERN SUPERIOR RES COM NEW	1,791,506	1,791,506
NORTHISLE COPPER & GLD INC	431,621	431,621
RADISSON MNG RES INC CL A	564,683	564,683

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
LIMITED PARTNERSHIPS	FMV	24,006,708	24,006,708
GOLD	FMV	165,295,191	165,295,191
SILVER	FMV	117,864,893	117,864,893
SPDR BLOOMBERG 13 MNTH TBILL ETF	FMV	297,491	297,491

TY 2023 IRS 990 e-File Render**Name:** THE PACKARD HUMANITIES INSTITUTE**EIN:** 94-3038401

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
OFFICE FURNITURE AND EQUIPMENT	2,943,539	2,767,532	176,007	176,007
COMPUTER HARDWARE/SOFTWARE	566,809	566,809	0	
LIBRARY	9,077	9,077	0	
LAND	15,418,800	0	15,418,800	15,418,800
BUILDING	180,203,316	34,495,153	145,708,163	145,708,163

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
GENERAL LEGAL FEES	112,025	3,361	0	99,056

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ASSETS HELD FOR CHARITABLE PURPOSES	8,547,825	8,547,825	8,547,825
ART AND FILM COLLECTIONS	22,486,206	22,486,557	22,486,557

TY 2023 IRS 990 e-File Render**Name:** THE PACKARD HUMANITIES INSTITUTE**EIN:** 94-3038401

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PHOTOCOPYING	419	0	0	419
INSURANCE	311,836	9,355	0	302,481
COMPUTER EXPENSES	430,202	0	0	388,816
BOOKS & SUBSCRIPTIONS	3,709	0	0	3,709
MISCELLANEOUS EXPENSES	2,862	0	0	2,842
STORAGE COSTS	57,399	0	0	57,399
MEMBERSHIPS & DUES	6,354	0	0	6,354
ADVERTISING	43,803	0	0	43,803
SUPPLIES & POSTAGE	65,606	0	0	65,374
CONTRACTORS	385,756	0	0	377,044
STAFF DEVELOPMENT	2,848	0	0	2,848
OPERATING EXPENSES	0	0	0	-2,933
PRINTING COST FOR BOOKS	251,719	0	0	249,558
PARTNERSHIP EXPENSES	0	652,153	0	0
EQUIPMENT MAINTENANCE & REPAIRS	803	0	0	803

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP INCOME	0	56,758	

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Description	Amount
UNREALIZED GAIN	30,386,130

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED TAXES	1,377,284	1,835,025

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTANTS/RESEARCHERS	1,704,531	0	0	1,597,892
INVESTMENT CUSTODY FEES	937,349	937,349	0	0
MUSIC EDITING	130,602	0	0	134,097
PHOTOGRAPHY	34	0	0	34
TRANSLATION EXPENSES	3,643	0	0	4,911
PRODUCTION COSTS	14,430	0	0	48,996

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CA FILING FEES	425	0	0	425
IRS FILING FEES	2,500	0	0	2,500
MA FILING FEES	622	0	0	622
SALES TAX/PROPERTY TAX	125,248	0	0	125,309
EXCISE TAX	634,610	0	0	0

TY 2023 IRS 990 e-File Render

Name: THE PACKARD HUMANITIES INSTITUTE

EIN: 94-3038401

Name	US / Foreign Address	EIN	Description	Amount
ISITUTO PACKARD PER I BENI CULTURALI	VIA PASQUALE PAOLI 25 PISA 56126 IT	000000000	GRANTS	2,152,000
Total				2,152,000