

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 2024, or tax year beginning 01-01-2024, and ending 12-31-2024

Name of foundation: HENRY P KENDALL FOUNDATION. A Employer identification number: 04-6029103. B Telephone number: (617) 951-2555. 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. H Check type of organization: Section 501(c)(3) exempt private foundation. I Fair market value of all assets at end of year: \$96,901,010. J Accounting method: Cash.

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 (500,000); 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 (1,986,863); 5a Gross rents; b Net rental income or (loss); 6a Net gain or (loss) from sale of assets not on line 10 (1,216,815); b Gross sales price for all assets on line 6a (14,556,440); 7 Capital gain net income (from Part IV, line 2) (1,216,813); 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) (attach schedule); 11 Other income (attach schedule) (136,836); 12 Total. Add lines 1 through 11 (3,840,514); 13 Compensation of officers, directors, trustees, etc. (536,749); 14 Other employee salaries and wages (267,178); 15 Pension plans, employee benefits (190,645); 16a Legal fees (attach schedule) (89,836); b Accounting fees (attach schedule) (40,000); c Other professional fees (attach schedule) (268,212); 17 Interest; 18 Taxes (attach schedule) (see instructions) (500); 19 Depreciation (attach schedule) and depletion (293); 20 Occupancy (36,885); 21 Travel, conferences, and meetings; 22 Printing and publications; 23 Other expenses (attach schedule) (1,061,198); 24 Total operating and administrative expenses. Add lines 13 through 23 (2,491,496); 25 Contributions, gifts, grants paid (3,279,854); 26 Total expenses and disbursements. Add lines 24 and 25 (5,771,350); 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements (-1,930,836); b Net investment income (if negative, enter -0-) (2,243,327); c Adjusted net income (if negative, enter -0-).

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	493,405	317,867	317,867
	<b>2</b> Savings and temporary cash investments . . . . .			
	<b>3</b> Accounts receivable ▶ <u>210,399</u>			
	Less: allowance for doubtful accounts ▶ _____	176,291	210,399	210,399
	<b>4</b> Pledges receivable ▶ _____			
	Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ <u>99,360</u>			
	Less: allowance for doubtful accounts ▶ _____ <u>0</u>	107,953	99,360	99,360
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .	5,826	25,122	25,122
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule) . . . . .			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	89,511,272	94,948,598	94,948,598
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .			
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ _____			
Less: accumulated depreciation (attach schedule) ▶ _____				
<b>12</b> Investments—mortgage loans . . . . .				
<b>13</b> Investments—other (attach schedule) . . . . .	1,654,025	1,289,301	1,289,301	
<b>14</b> Land, buildings, and equipment: basis ▶ <u>72,088</u>				
Less: accumulated depreciation (attach schedule) ▶ <u>71,650</u>	731	438	438	
<b>15</b> Other assets (describe ▶ _____)	23,165	9,925	9,925	
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	91,972,668	96,901,010	96,901,010	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	42,070	90,421	
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue. . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons . . . . .			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	42,070	90,421	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .	91,930,598	96,810,589	
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .			
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .			
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds . . . . .			
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	91,930,598	96,810,589		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	91,972,668	96,901,010		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	91,930,598
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-1,930,836
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	6,813,826
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	96,813,588
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	2,999
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 . . . . .	<b>6</b>	96,810,589

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows include various investment funds and real estate.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Rows show detailed financial data for each asset.

Table with 4 columns: (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), (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)).

Summary rows for capital gain net income (line 2) and net short-term capital gain or (loss) (line 3).

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

Table for excise tax calculation with 11 numbered rows. Includes instructions for exempt foundations, tax payments, and overpayment calculations.

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 3 columns: Question, Yes, No. Row 1a: Yes, No.

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 3 columns: Question, Yes, No. Row 1b: Yes, No.

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

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

Table with 3 columns: Question, Yes, No. Row 1c: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 1d: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 2: Yes, No.

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 3 columns: Question, Yes, No. Row 3: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 4a: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 4b: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 5: Yes, No.

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 3 columns: Question, Yes, No. Row 6: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 7: Yes, No.

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 3 columns: Question, Yes, No. Row 8a: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 8b: Yes, No.

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 3 columns: Question, Yes, No. Row 9: Yes, No.

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 2024 or the taxable year beginning in 2024? See the instructions for Part XIII. If "Yes," complete Part XIII.

Table with 3 columns: Question, Yes, No. Row 10: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 11: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 12: Yes, No.

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

Table with 3 columns: Question, Yes, No. Row 13: Yes, No.

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.KENDALL.ORG

Table with 3 columns: Question, Yes, No. Row 14: Yes, No.

14 The books are in care of JOHN MCCRAE Telephone no. (617) 951-2525 Located at PO BOX 70 MARION MA ZIP+4 02738

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

Table with 3 columns: Question, Yes, No. Row 16: Yes, No.

16 At any time during calendar year 2024, 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 3 columns: Question, Yes, No. Row 16: Yes, 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 2024? . . . . .
- 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 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024? . . . . .  
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 2024 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 2024.) . . . . .
- 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 2024?

	Yes	No
<b>1a(1)</b>		No
<b>1a(2)</b>		No
<b>1a(3)</b>		No
<b>1a(4)</b>		No
<b>1a(5)</b>		No
<b>1a(6)</b>		No
<b>1b</b>		
<b>1d</b>		No
<b>2a</b>		No
<b>2b</b>		
<b>3a</b>		No
<b>3b</b>		
<b>4a</b>		No
<b>4b</b>		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
<b>5a(1)</b>		No
<b>5a(2)</b>		No
<b>5a(3)</b>		No
<b>5a(4)</b>		No
<b>5a(5)</b>		No
<b>5b</b>		
<b>5d</b>		
<b>6a</b>		No
<b>6b</b>		No
<b>7a</b>		No
<b>7b</b>		
<b>8</b>		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
JOHN P KENDALL 29 HOLMES STREET MARION, MA 02738	TRUSTEE 2.00	0	0	0
ANDREW W KENDALL 29 HOLMES STREET MARION, MA 02738	TRUSTEE/EXECUTIVE DIRECTOR 40.00	536,749	53,779	0
PHOEBE S WINDER 29 HOLMES STREET MARION, MA 02738	TRUSTEE 2.00	0	0	0
KENNETH F MEYERS 29 HOLMES STREET MARION, MA 02738	TRUSTEE 2.00	0	0	0
TORE C NELSON 29 HOLMES STREET MARION, MA 02738	TRUSTEE 2.00	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
BETH ZSCHAU PO BOX 70 MARION, MA 02738	PROGRAM OFFICER 40.00	194,736	50,359	0
HOLLY HANNAWAY PO BOX 70 MARION, MA 02738	PROGRAM ASSISTANT 40.00	73,768	40,374	0

**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
NORTHERN TRUST COMPANY 125 SUMMER STREET SUITE 1400 BOSTON, MA 02110	INVESTMENT MANAGEMENT	93,423
SULLIVAN & WORCESTER LLP PO BOX 847423 BOSTON, MA 02284	LEGAL	78,151
NEPC LLC 255 STATE STREET BOSTON, MA 02109	INVESTMENT MANAGEMENT	68,241
DARMODY MERLINO & CO LLP C/O HEITMAN LLC 191 NORTH WACKER DRIVE 2500 CHICAGO, IL 60606	ACCOUNTANT	34,000
HAIRPIN COMMUNICATIONS LLC 74 HOWE STREET ASHLAND, MA 01721	CONSULTANTS	14,400

**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.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	95,521,000
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	516,170
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	225,949
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	96,263,119
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	96,263,119
<b>4</b>	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	1,443,947
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. . . . .	<b>5</b>	94,819,172
<b>6</b>	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5. . . . .	<b>6</b>	4,740,959

**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.)

<b>1</b>	Minimum investment return from Part IX, line 6. . . . .	<b>1</b>	4,740,959
<b>2a</b>	Tax on investment income for 2024 from Part V, line 5. . . . .	<b>2a</b>	31,182
<b>b</b>	Income tax for 2024. (This does not include the tax from Part V.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	31,182
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	4,709,777
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	4,709,777
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1. . . . .	<b>7</b>	4,709,777

**Part XI Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26. . . . .	<b>1a</b>	4,670,851
<b>b</b>	Program-related investments—total from Part VIII-B	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	0
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4. . . . .	<b>4</b>	4,670,851

**Part XII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
<b>1</b> Distributable amount for 2024 from Part X, line 7				4,709,777
<b>2</b> Undistributed income, if any, as of the end of 2024:				
<b>a</b> Enter amount for 2023 only. . . . .			0	
<b>b</b> Total for prior years: 20 ____, 20 ____, 20 ____		0		
<b>3</b> Excess distributions carryover, if any, to 2024:				
<b>a</b> From 2019. . . . .				
<b>b</b> From 2020. . . . .				
<b>c</b> From 2021. . . . .				
<b>d</b> From 2022. . . . .			880,021	
<b>e</b> From 2023. . . . .			584,597	
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	1,464,618			
<b>4</b> Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ <u>4,670,851</u>				
<b>a</b> Applied to 2023, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2024 distributable amount				4,670,851
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2024. (If an amount appears in column (d), the same amount must be shown in column (a).)	38,926			38,926
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,425,692			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b. . . . .		0		
<b>c</b> 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		
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions. . . . .		0		
<b>e</b> Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				0
<b>7</b> 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			
<b>8</b> Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)	0			
<b>9</b> <b>Excess distributions carryover to 2025.</b> Subtract lines 7 and 8 from line 6a	1,425,692			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2020				
<b>b</b> Excess from 2021				
<b>c</b> Excess from 2022. . . . .			841,095	
<b>d</b> Excess from 2023			584,597	
<b>e</b> Excess from 2024				



**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)				
<b>a</b> <i>Paid during the year</i> AMMONOOSUC CONSERVATION TRUST PO BOX 191 FRANCONIA, NH 03580	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	1,000
CENTER FOR AGRICULTURAL ECONOMY PO BOX 451 41 SOUTH MAIN STREET HARDWICK, VT 05843	NO RELATIONSHIP	P C	STRENGTHEN THE FARM TO SCHOOL PREPARED PRODUCE PROGRAM	50,000
CITY OF NEW BEDFORD 1213 PURCHASE STREET NEW BEDFORD, MA 02740	NO RELATIONSHIP	P C	PROVIDING FRESH PREPARED MEALS TO 34 SCHOOLS	125,000
COMMERCIAL FISHERIES CENTER OF RI PO BOX 5161 WAKEFIELD, RI 02880	NO RELATIONSHIP	P C	BUILDING DEMAND FOR UNDERUTILIZED FISH SPECIES IN SCHOOL FOOD	200,000
COMMUNITY INVOLVED IN SUSTAINING AGRICULTURE ONE SUGARLOAF STREET SOUTH DEERFIELD, MA 01373	NO RELATIONSHIP	P C	OPERATING SUPPORT FOR ASSISTING FARMS EXPERIENCING UNFORESEEN EMERGENCIES	60,000
ECOLOGY LEARNING CENTER 230 MAIN STREET UNITY, ME 04988	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
EMORY UNIVERSITY 1762 CLIFTON ROAD SUITE 1400 ATLANTA, GA 30322	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	1,000
FARM FRESH RHODE ISLAND 10 SIMS AVENUE UNIT 103 PROVIDENCE, RI 02909	NO RELATIONSHIP	P C	SUPPORT THE FARM TO SCHOOL SALES PROGRAM SERVING ALL 36 RHODE ISLAND SCHOOL DISTRICTS	50,000
FOOD BANK OF WESTERN MASSACHUSETTS PO BOX 160 HATFIELD, MA 01038	NO RELATIONSHIP	P C	STRENGTHENING FOOD BANK - LOCAL FARMER CONNECTIONS IN SPRINGFIELD	124,420
FOOD FOR FREE COMMITTEES INC 11 INMAN STREET CAMBRIDGE, MA 02139	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
FOODCORPS 1140 SE 7TH AVE SUITE 110 PORTLAND, OR 97214	NO RELATIONSHIP	P C	SUPPORT THE EMERGING WORK IN RHODE ISLAND'S K-12 SCHOOLS	500
FORK FOOD LAB 95-97 DARLING AVE SOUTH PORTLAND, ME 04106	NO RELATIONSHIP	P C	UPCYCLING BROCCOLI PROCESSING BYPRODUCTS	193,369
GROWING PLACES GARDEN PROJECTS INC 325 LINDELL AVE LEOMINSTER, MA 01453	NO RELATIONSHIP	P C	LOCAL FOOD WORKS FOR EDUCATIONAL INSTITUTIONS	119,885
HEALTHY COMMUNITIES OF THE CAPITAL AREA 11 MECHANIC STREET SUITE 101 GARDINER, ME 04345	NO RELATIONSHIP	P C	ADVANCING FARM AND SEA SCHOOL INITIATIVES ACROSS MAINE	50,000
INTERVALE CENTER INC	NO RELATIONSHIP	P C	EXPANDING INSTITUTIONAL FOOD	150,000

180 INTERVALE ROAD BURLINGTON,VT 05401			MARKETS	
JUST ROOTS INC  34 GLENBROOK DRIVE APT 1B GREENFIELD,MA 01301	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
LIFT THE CYRUS ZSCHAU MEMORIAL FUND  961 ROUTE 100B MORETOWN,VT 05660	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
MAINE COAST FISHERMAN'S ASSOCIATION  93 PLEASANT STREET BRUNWICK,ME 04011	NO RELATIONSHIP	P C	DEVELOP A VALUE-ADDED FISH CAKE FOR K-12 LUNCH MENUS THROUGHOUT MAINE	120,000
MARTHA'S VINEYARD FISHERMAN'S PRESERVATION  PO BOX 96 MENEMSHA,MA 02552	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
MASS ENVIRONMENTAL EDUCION SOCIETY  450 PROVIDENCE HIGHWAY DEDHAM,MA 02026	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
MILL CITY GROWS INC  650 SUFFOLK STREET SUITE G10 LOWELL,MA 01854	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
POPE FRANCIS PREPARATORY SCHOOL  99 WENDOVER ROAD SPRINGFIELD,MA 01118	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
RED TOMATO  78 EVERETT SKINNER ROAD PLAINVILLE,MA 02907	NO RELATIONSHIP	P C	BUILDING ACCESS INTO FARM TO SCHOOL SUPPLY CHAINS	53,012
RHODE ISLAND DEPARTMENT OF COMMERCE  315 IRON HORSE WAY SUITE 101 PROVIDENCE,RI 02908	NO RELATIONSHIP	P C	RENEWING THE RHODE ISLAND FOOD SYSTEM PLAN FOR 2030	70,000
RHODE ISLAND FOOD POLICY COUNCIL  1618 SOUTH ROAD KINGSTON,RI 02881	NO RELATIONSHIP	P C	BUILDING CAPACITY IN THE LOCAL FOOD SYSTEM FOR HEALTHY LIVES	50,000
RISE ABOVE FOUNDATION  PO BOX 174 NORTHBRIDGE,MA 01534	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
ROOTS RISING INC  923 BARKER ROAD PITTSFIELD,MA 01201	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
SHELBURNE FARMS  1611 HARBOR RD SHELBURNE,VT 05482	NO RELATIONSHIP	P C	SUSTAIN FARM TO SCHOOL EFFORTS ACROSS THE NORTHEAST REGION	100,000
SKOWHEGAN ECONOMIC DEVELOPMENT CORP  225 WATER STREET SKOWHEGAN,ME 04976	NO RELATIONSHIP	P C	EXPAND CAPACITY TO MANUFACTURE UPCYCLED NUTRITIOUS GRAIN CEREALS FOR COLLEGE STUDENTS	200,000
SOUTHSIDE COMMUNITY LAND TRUST  109 SOMERSET STREET PROVIDENCE,RI 02907	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	500
SOUTHWEST OASIS LABRADOR	NO RELATIONSHIP	P C	UNRESTRICTED OPERATING SUPPORT	1,000

RESCUE INC 7739 E BROADWAY STE 212 TUCSON,AZ 85710				
SPRINGFIELD PUBLIC SCHOOLS 1550 MAIN STREET SPRINGFIELD,MA 01103	NO RELATIONSHIP	PC	SUPPORT THE SPRINGFIELD CULINARY AND NUTRITION CENTER SERVING SPRINGFIELD K -12	10,000
SUPPORT OUR LIBRARY ASSOCIATION INC 84 PARK STREET STOUGHTON,MA 02072	NO RELATIONSHIP	PC	UNRESTRICTED OPERATING SUPPORT	500
THIRD SECTOR NEW ENGLAND 89 SOUTH STREET 700 BOSTON,MA 02111	NO RELATIONSHIP	PC	1. STRENGTHEN REGIONAL FARM TO SCHOOL MOVEMENT 2. SUPPORT THE 7TH ANNUAL FARM TO SCHOOL INSITITUTE AND PROFESSIONAL LEARNING OPPORTUNITIES 3. ENGAGE A DIVERSE COALITION OF FOOD SYSTEM STAKEHOLDERS IN ADVOCACY EFFORTS	300,000
UNIVERSITY OF CONNECTICUT FOUNDATION 2390 ALUMNI DRIVE UNIT 3206 STORRS,CT 06269	NO RELATIONSHIP	PC	TO INCREASE THE COLLABORATIVES NETWORK IMPACT AND BUILD A LONG-TERM PLAN	50,000
UNIVERSITY OF NEW HAMPSHIRE 107 NESMITH HALL 131 MAIN ST DURHAM,NH 03824	NO RELATIONSHIP	PC	1. SUPPORT FOOD SYSTEMS NETWORK EXPANSION WITH OPERATING SUPPORT 2. CREATING CULTURALLY CONNECTED CAFETERIAS IN THE MANCHESTER NH SCHOOL DISTRICT 3. OPERATING SUPPORT TO BUILD A THRIVING AND SUSTAINABLE FOOD SYSTEM IN NEW HAMPSHIRE 4.OPERATING SUPPORT FOR THE STATE'S FARM TO SCHOOL AND SCHOOL GARDEN NETWORKS	310,894
URBAN FOOD INITIATIVE 54 WILDE ROAD WABAN,MA 02468	NO RELATIONSHIP	PC	PROVIDE OPERATING STABILITY DURING HISTORIC INFLATION AND PANDEMIC IMPACT	500,000
VERMONT FARM TO SCHOOL INC 115 2ND STREET NEWPORT,VT 05855	NO RELATIONSHIP	PC	1.SUPPORT THE FARM TO SCHOOL SALES INITIATIVE AND FOOD HUB ENTERPRISE 2. ADVANCING LOCAL PROCUREMENT IN VERMONT'S SCHOOL CAFETERIAS	108,774
VERMONT SUSTAINABLE JOBS FUND 3 PITKIN COURT SUITE 301E MONTPELIER,VT 05602	NO RELATIONSHIP	PC	1. SUPPORT TRANSFORMATIVE PROJECTS TO MAKE SYSTEMATIC FOOD SYSTEM CHANGES 2. OPERATING SUPPORT FOR VT SUSTAINABLE JOBS FUND	275,000
<b>Total . . . . .</b>			<b>▶ 3a</b>	<b>3,279,854</b>

**b** *Approved for future payment*

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
b
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**

**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, or 990-PF.  
 ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

Name of the organization HENRY P KENDALL FOUNDATION	<b>Employer identification number</b> 04-6029103
--	---

**Organization type** (check one):

**Filers of:**

**Section:**

- Form 990 or 990-EZ
  - 501(c)( ) (enter number) organization
  - 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
  - 527 political organization
- Form 990-PF
  - 501(c)(3) exempt private foundation
  - 4947(a)(1) nonexempt charitable trust treated as a private foundation
  - 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.  
**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33<sup>1</sup>/<sub>3</sub>% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization  
HENRY P KENDALL FOUNDATION

Employer identification number  
04-6029103

**Part I**

**Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	NORFOLK CHARITABLE TRUST <hr/> PO BOX 70 <hr/> MARION, MA 02738	<hr/> \$ 500,000	<input checked="" type="checkbox"/> <b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> <b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> <b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> <b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> <b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> <b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> (Complete Part II for noncash contributions.)

Name of organization  
HENRY P KENDALL FOUNDATION

Employer identification number  
04-6029103

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____

Name of organization

HENRY P KENDALL FOUNDATION

Employer identification number

04-6029103

**Part III** **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c) (7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) \$ \_\_\_\_\_

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	

## **Additional Data**

**Return to Form**

**Software ID:**

**Software Version:**

# TY 2024 IRS 990 e-File Render

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	40,000	17,000		23,000

**Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.**

**TY 2024 IRS 990 e-File Render**

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

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
COMPUTER EQUIPMENT - 2010	2010-12-31	2,390	2,390	200DB	5.000000000000	0	0		
COMPUTER EQUIPMENT - 2011	2011-12-31	2,164	2,164	200DB	5.000000000000	0	0		
FURNITURE & FIXTURES	2002-07-01	3,100	3,100	200DB	7.000000000000	0	0		
FURNITURE & FIXTURES	2008-08-15	2,216	2,216	200DB	7.000000000000	0	0		
COMPUTER EQUIPMENT - 2016	2016-04-18	2,241	1,120	200DB	5.000000000000	0	0		
COMPUTER EQUIPMENT - 2018	2018-12-19	2,050		200DB	5.000000000000	0	0		
COMPUTER EQUIPMENT - 2019	2019-03-06	2,051		200DB	5.000000000000	0	0		
COMPUTER EQUIPMENT - 2020	2020-04-14	1,381		200DB	5.000000000000	0	0		
COMPUTER EQUIPMENT - 2023	2023-03-15	3,148	126	200DB	5.000000000000	202	0		
COMPUTER EQUIPMENT - 2023	2023-12-31	1,419	57	200DB	5.000000000000	91	0		

# TY 2024 IRS 990 e-File Render

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SECURITIES, FIXED INCOME & MUTUAL FUNDS	94,948,598	94,948,598

# TY 2024 IRS 990 e-File Render

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
LITTLE LEAF FARMS LLC	AT COST	1,289,301	1,289,301

**TY 2024 IRS 990 e-File Render****Name:** HENRY P KENDALL FOUNDATION**EIN:** 04-6029103

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER EQUIPMENT - 2010	2,390	2,390	0	
COMPUTER EQUIPMENT - 2011	2,164	2,164	0	
FURNITURE & FIXTURES	3,100	3,100	0	
FURNITURE & FIXTURES	2,216	2,216	0	
COMPUTER EQUIPMENT - 2018	2,050	2,050	0	
COMPUTER EQUIPMENT - 2019	2,051	2,051	0	
WEBSITE DEVELOPMENT	53,550	53,550	0	
COMPUTER EQUIPMENT - 2023	3,148	2,846	302	
COMPUTER EQUIPMENT - 2023	1,419	1,283	136	

# TY 2024 IRS 990 e-File Render

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	89,836	11,685		78,151

# TY 2024 IRS 990 e-File Render

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
SECURITY DEPOSITS	23,165	9,925	9,925

# TY 2024 IRS 990 e-File Render

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Description	Amount
OTHER DIFFERENCES AS REPORTED ON K-1 PASS-THROUGH ENTITIES	2,999

**TY 2024 IRS 990 e-File Render**

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COMPUTER EXPENSE	2,826	0		2,826
OFFICE EXPENSE	-3,151	0		-3,151
POSTAGE & DELIVERY	161	0		161
PROGRAM EXPENSES	37,346	0		37,346
TELEPHONE & INTERNET	17,559	0		17,559
SHARON PROPERTY COSTS	503	0		503
DEDUCTIONS FROM INVESCO DB COMMODITY INDEX TRACKING FUND K-1	0	368		0
INSURANCE	5,249	0		5,249
DEDUCTIONS FROM HEITMAN AMERICA REAL ESTATE TRUST K-1	45	45		0
DEDUCTIONS FROM HIGHBAR PARTNERS III K-1	38,766	38,766		0
DEDUCTIONS FROM LITTLE LEAF FARM LLC K-1	39,873	39,873		0
DEDUCTIONS FROM DALFEN LAST MILE INDUSTRIAL FUND K-1	3,348	3,348		0
DEDUCTIONS FROM INDUSTRY VENTURES IX K-1	28,081	28,081		0
DEDUCTIONS FROM IPI FUND II-A LP K-1	23,501	23,501		0
DEDUCTIONS FROM ARA FUND II-A K-1	14,375	14,375		0
DEDUCTIONS FROM TRIVE CAPITAL IV K-1	8,316	8,316		0
INVESTMENT LOSS FROM LITTLE LEAF FARM	324,937	324,937		0
INVESTMENT LOSS FROM GLENDOWER SOF IV	49,515	49,515		0
INVESTMENT LOSS FROM DIRECT LENDING FUND III	3,054	3,054		0
INVESTMENT LOSS FROM TRIVE CAPITAL IV	5,770	5,770		0
DEDUCTIONS FROM NEXUS SPECIAL SITUATIONS K-1	13,681	13,681		0
DEDUCTIONS FROM ENTERPRISE PARTNERS K-1	0	0		0
INVESTMENT LOSS FROM GLENDOWER SOF V	72,635	72,635		0
MANAGEMENT FEES	180,000	0		180,000
DEDUCTIONS FROM THOMABRAVO K-1	16,241	16,241		0
DEDUCTIONS FROM IPI FUND III-A LP K-1	24,402	24,402		0
DEDUCTIONS FROM ATLAS CAPITAL RESOURCES K-1	7,311	7,311		0
DEDUCTION FROM WINDROSE K-1	22,456	22,456		0
INVESTMENT LOSS FROM INDUSTRY VENTURES X	3,126	3,126		0
INVESTMENT LOSS FROM INDUSTRY VENTURES IX	7	7		0
DEDUCTION FROM INDUSTRY VENTURES X K-1	19,034	19,034		0
DEDUCTION FROM CVI CREDIT VALUE FUND K-1	1,178	1,178		0
INVESTMENT LOSS FROM CVI CREDIT VALUE FUND	72	72		0
INVESTMENT LOSS FROM GLENDOWER SOF VI	13,990	13,990		0
INVESTMENT LOSS FROM PSG VI	1	1		0
INVESTMENT LOSS FROM TRIVE CAPITAL V	15,133	15,133		0
INVESTMENT LOSS FROM CRESCENT DIRECT LENDING	1,952	1,952		0
BAD DEBT	9,337	0		9,337
DEDUCTION FROM CVC IX K-1	15,544	15,544		0
DEDUCTION FROM PSG VI K-1	36,959	36,959		0
DEDUCTION FROM TRIVE CAPITAL V K-1	8,065	8,065		0

**TY 2024 IRS 990 e-File Render****Name:** HENRY P KENDALL FOUNDATION**EIN:** 04-6029103

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
CRESCENT DIRECT LENDING FUND, LP - K-1	0	0	0
IR&M CORE BOND FUND II	10,964	10,964	10,964
POWERSHARES DB COMMODITY INDEX TRACKING - K-1	0	-1,446	0
LITTLE LEAF FARM LLC - K-1	0	0	0
GLENDWOER SOF IV	0	0	0
DIRECT LENDING FUND III	0	0	0
CVI CREDIT VALUE FUND	0	0	0
INDUSTRY VENTURES IX	0	0	0
ENTERPRISE PRODUCTS PARTNERS L.P. - K-1	0	2,533	0
NEXUS SPECIAL SITUATIONS III	98,450	98,450	98,450
ARA FUND II-A	432	432	432
TRIVE CAPITAL IV	0	0	0
IR&M SHORT FUND	2,738	2,738	2,738
IPI FUND III-A LP	14,794	14,794	14,794
IPI FUND II-A LP	8,158	8,158	8,158
GLENDOWER SOF V	0	0	0
INDUSTRY VENTURES X	0	0	0
ATLAS CAPITAL RESOURCES	9	9	9
CVC IX	1,291	1,291	1,291
GLENDOWER SOF VI	0	0	0
PSG VI	0	0	0
TRIVE CAPITAL V	0	0	0

# TY 2024 IRS 990 e-File Render

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Description	Amount
NET UNREALIZED GAINS (LOSSES) ON INVESTMENTS AND LIMITED PARTNERSHIPS	6,813,826

**Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.**

**TY 2024 IRS 990 e-File  
Render**

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Borrower's Name	Relationship to Insider	Original Amount of Loan	Balance Due	Date of Note	Maturity Date	Repayment Terms	Interest Rate	Security Provided by Borrower	Purpose of Loan	Description of Lender Consideration	Consideration FMV
PIONEER VALLEY GROWS RISK CAPITAL POOL	NONE	25,000	25,000	2015-12	2021-12	LUMP SUM, INCLUDING ACCRUED INTEREST	0 %		PROGRAM-RELATED INVESTMENT	CASH	25,000
PIONEER VALLEY GROWS PATIENT CAPITAL POOL	NONE	37,500	37,272	2015-12	2018-07	LUMP SUM, INCLUDING ACCRUED INTEREST	400.0000000000 %		PROGRAM-RELATED INVESTMENT	CASH	37,500
PIONEER VALLEY GROWS PATIENT CAPITAL POOL	NONE	37,500	37,088	2018-09	2026-09		400.0000000000 %		PROGRAM-RELATED INVESTMENT	CASH	37,500

# TY 2024 IRS 990 e-File Render

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ALLOCABLE CONSULTING FEES	73,141	68,241		4,900
INVESTMENT MANAGEMENT FEES	126,019	126,019		0
CUSTODIAN FEES	65,893	65,893		0
RETIREMENT PLAN SERVICES	3,159	0		3,159

# TY 2024 IRS 990 e-File Render

**Name:** HENRY P KENDALL FOUNDATION

**EIN:** 04-6029103

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MASSACHUSETTS ANNUAL REPORT - FORM PC	500	0		500
FEDERAL EXCISE TAX ON NET INVESTMENT INCOME	0	0		0