

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

Name of foundation BERNARD F & ALVA B GIMBEL FOUNDATION INC		A Employer identification number 13-6090843	
Number and street (or P.O. box number if mail is not delivered to street address) 271 MADISON AVE SUITE 605		Room/suite	B Telephone number (see instructions) (212) 684-9110
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10016		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 40,429,545	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	826,170	826,170		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	5,263,378			
	b Gross sales price for all assets on line 6a 9,821,127				
	7 Capital gain net income (from Part IV, line 2) . . .		5,263,378		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	6,089,548	6,089,548	0	
	13 Compensation of officers, directors, trustees, etc.	191,292	0	0	191,292
	14 Other employee salaries and wages	216,143	0	0	216,143
	15 Pension plans, employee benefits	77,479	0	0	77,479
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	28,350	14,175	0	14,175
	c Other professional fees (attach schedule)	282,340	277,840	0	4,500
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	106,035	11,035	0	0
	19 Depreciation (attach schedule) and depletion . .	1,117	0	0	
	20 Occupancy	80,064	0	0	80,064
	21 Travel, conferences, and meetings	251	0	0	251
	22 Printing and publications				
	23 Other expenses (attach schedule)	115,279	88,838	0	26,441
	24 Total operating and administrative expenses. Add lines 13 through 23	1,098,350	391,888	0	610,345
	25 Contributions, gifts, grants paid	6,007,084			6,007,084
	26 Total expenses and disbursements. Add lines 24 and 25	7,105,434	391,888	0	6,617,429
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-1,015,886			
	b Net investment income (if negative, enter -0-)		5,697,660		
	c Adjusted net income (if negative, enter -0-)			0	

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		58,831	83,220	83,220
	2	Savings and temporary cash investments		11,400,816	11,653,746	11,653,746
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)		10,703,158	9,466,656	17,664,697
	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)		10,682,488	10,626,895	11,006,535
	14	Land, buildings, and equipment: basis ▶ _____ 87,861 Less: accumulated depreciation (attach schedule) ▶ _____ 78,443		10,535	9,418	9,418
15	Other assets (describe ▶ _____)		11,929	11,929	11,929	
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		32,867,757	31,851,864	40,429,545	
Liabilities	17	Accounts payable and accrued expenses				
	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 ▶ _____)		2,164	2,157	
	23	Total liabilities (add lines 17 through 22).		2,164	2,157	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds		6,657,124	6,657,124	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund		0	0	
	28	Retained earnings, accumulated income, endowment, or other funds		26,208,469	25,192,583	
	29	Total net assets or fund balances (see instructions)		32,865,593	31,849,707	
	30	Total liabilities and net assets/fund balances (see instructions) .		32,867,757	31,851,864	

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	32,865,593
2	Enter amount from Part I, line 27a	2	-1,015,886
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	31,849,707
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	31,849,707

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 SHORT TERM GAIN OR LOSS FROM PASS-THROUGH ENTITIES	P	2020-01-01	2024-12-31
b LONG TERM GAIN OR LOSS FROM PASS-THROUGH ENTITIES	P	2020-01-01	2024-12-31
c SALE OF MARKETABLE SECURITIES - SCHWAB		2024-01-01	2024-12-31
d SALE OF MARKETABLE SECURITIES - SCHWAB		2024-01-01	2024-12-31
e SALE OF MARKETABLE SECURITIES - PERSHING		2024-01-01	2024-12-31
SALE OF MARKETABLE SECURITIES - PERSHING		2024-01-01	2024-12-31

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 72,163			72,163
b 569,423			569,423
c 189,590		141,811	47,779
d 4,948,863		2,203,134	2,745,729
e 325,032		313,441	11,591
3,716,056		1,899,363	1,816,693

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			72,163
b			569,423
c			47,779
d			2,745,729
e			11,591
			1,816,693

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	5,263,378
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	131,533

Part V

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
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	79,197
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	79,197
6	Credits/Payments:		
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	96,245
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	35,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	131,245
8	Enter any penalty for underpayment of estimated tax. Check here ☐ 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	52,048
11	Enter the amount of line 10 to be: Credited to 2025 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?		Yes	No
1a				No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.			No
	<i>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.</i>			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 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? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NY			
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? <i>If "No," attach explanation</i> .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2024 or the taxable year beginning in 2024? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," attach schedule. See instructions.</i>	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i>	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ WWW.GIMBELFOUNDATION.ORG	13	Yes	
14	The books are in care of ▶ GIMBEL FOUNDATION Telephone no. ▶ (212) 684-9110 Located at ▶ 271 MADISON AVE SUITE 605 NEW YORK NY ZIP+4 ▶ 10016			
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 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. <i>If "Yes", enter the name of the foreign country</i> ▶	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.

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)	No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)	No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)	No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)	No
b	If any answer is "Yes" to 1a(1)–(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	No
c	Organizations relying on a current notice regarding disaster assistance check here.  		
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2024?	1d	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 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____	2a	No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	No
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.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2024?	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?

6b

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?

7b

If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?

8

Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

Yes

No

5a(1)

No

5a(2)

No

5a(3)

No

5a(4)

No

5a(5)

No

5b

5d

6a

No

6b

No

7a

No

7b

8

No

Part VII

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

1

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
STEPHEN D GREENBERG C/O GIMBEL FOUNDATION 271 MADISON AVE SUITE 605 NEW YORK, NY 10016	TREASURER 1.00	0	0	0
LYNN S STERN C/O GIMBEL FOUNDATION 271 MADISON AVE SUITE 605 NEW YORK, NY 10016	VICE PRESIDENT 1.00	0	0	0
LESLIE GIMBEL C/O GIMBEL FOUNDATION 271 MADISON AVE SUITE 605 NEW YORK, NY 10016	PRESIDENT & CEO 40.00	191,292	943	0
NICHOLAS SG STERN C/O GIMBEL FOUNDATION 271 MADISON AVE SUITE 605 NEW YORK, NY 10016	DIRECTOR 1.00	0	0	0
THOMAS ST GIMBEL C/O GIMBEL FOUNDATION 271 MADISON AVE SUITE 605 NEW YORK, NY 10016	DIRECTOR 1.00	0	0	0
ALVA G GREENBERG C/O GIMBEL FOUNDATION 271 MADISON AVE SUITE 605 NEW YORK, NY 10016	DIRECTOR 1.00	0	0	0
JENNIFER BLOOM GREENBERG C/O GIMBEL FOUNDATION 271 MADISON AVE SUITE 605 NEW YORK, NY 10016	DIRECTOR 1.00	0	0	0
HOPE KITTREDGE GIMBEL C/O GIMBEL FOUNDATION 271 MADISON AVE SUITE 605 NEW YORK, NY 10016	DIRECTOR 1.00	0	0	0
MARK P GIMBEL C/O GIMBEL FOUNDATION 271 MADISON AVE SUITE 605 NEW YORK, NY 10016	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
DOROTHY A KADAR C/O GIMBEL FOUNDATION 271 MADISON AVE STE 605 NEW YORK, NY 10016	PROGRAM OFFICER 40.00	115,897	27,735	0
NATALIE F MAYRO C/O GIMBEL FOUNDATION 271 MADISON AVE STE 605 NEW YORK, NY 10016	OFFICE & GRANTS ADM 40.00	100,246	22,733	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
GIVERNY CAPITAL ADVISORS LLC	INVESTMENT ADVISOR	141,509
627 ROUTE 518 SKILLMAN,NJ 08558		
BRAVE WARRIOR ADVISORS LLC	INVESTMENT ADVISOR	136,321
12 EAST 49TH STREET NEW YORK,NY 10017		

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	

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	19,020,388
b	Average of monthly cash balances.	1b	11,212,152
c	Fair market value of all other assets (see instructions).	1c	10,447,987
d	Total (add lines 1a, b, and c).	1d	40,680,527
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	40,680,527
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	610,208
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	40,070,319
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	2,003,516

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	2,003,516
2a	Tax on investment income for 2024 from Part V, line 5.	2a	79,197
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	79,197
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,924,319
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,924,319
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	1,924,319

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	6,617,429
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	6,617,429

Part XII

Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7					1,924,319
2 Undistributed income, if any, as of the end of 2024:					
a Enter amount for 2023 only.				0	
b Total for prior years: 20 ____ , 20 ____ , 20 ____			0		
3 Excess distributions carryover, if any, to 2024:					
a From 2019.		2,373,577			
b From 2020.		2,384,969			
c From 2021.		2,964,384			
d From 2022.		3,995,072			
e From 2023.		4,110,497			
f Total of lines 3a through e.		15,828,499			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ 6,617,429					
a Applied to 2023, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see instructions).			0		
c Treated as distributions out of corpus (Election required—see instructions).		0			
d Applied to 2024 distributable amount					1,924,319
e Remaining amount distributed out of corpus		4,693,110			
5 Excess distributions carryover applied to 2024. (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		20,521,609			
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 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.				0	
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).		0			
8 Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)		2,373,577			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a		18,148,032			
10 Analysis of line 9:					
a Excess from 2020		2,384,969			
b Excess from 2021		2,964,384			
c Excess from 2022.		3,995,072			
d Excess from 2023		4,110,497			
e Excess from 2024		4,693,110			

a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2024, 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)

Form **990-PF** (2024)

Form 990-PF (2024)					Page 11
Part 2 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 Paid during the year					
3500RG PO BOX 843004 BOSTON,MA 02284	NONE	P C	GENERAL SUPPORT	150,000	
ALL VOTING IS LOCAL 11 DUPONT CIRCLE NW SUITE 575 WASHINGTON,DC 20036	NONE	P C	GENERAL SUPPORT	100,000	
ALL VOTING IS LOCAL 11 DUPONT CIRCLE NW SUITE 575 WASHINGTON,DC 20036	NONE	P C	GENERAL SUPPORT	100,000	
AMERICAN CONSTITUTION SOCIETY 601 13TH STREET NW WASHINGTON,DC 20005	NONE	P C	GENERAL SUPPORT	100,000	
ANDOVER VILLAGE IMPROVEMENT SOCIETY PO BOX 5097 ANDOVER,MA 01810	NONE	P C	GENERAL SUPPORT	5,000	
APERTURE FOUNDATION INC 548 WEST 28TH STREET 4TH FLOOR NEW YORK,NY 10001	NONE	P C	GENERAL SUPPORT	6,500	
BLUEGREEN ALLIANCE FOUNDATION 2701 UNIVERSITY AVENUE SE SUITE 209 MINNEAPOLIS,MN 55414	NONE	P C	OFFSHORE WIND PROGRAM	40,000	
BLUEGREEN ALLIANCE FOUNDATION 2701 UNIVERSITY AVENUE SE SUITE 209 MINNEAPOLIS,MN 55414	NONE	P C	GENERAL SUPPORT	50,000	
BOSTON CHILDREN'S HOSPITAL 300 LONGWOOD AVENUE BOSTON,MA 02115	NONE	P C	DUCHENNE MUSCULAR DYSTROPHY RESEARCH	60,000	
BOSTON CHILDREN'S HOSPITAL 300 LONGWOOD AVENUE BOSTON,MA 02115	NONE	P C	DUCHENNE MUSCULAR DYSTROPHY RESEARCH	5,000	
BROOKLYN WORKFORCE INNOVATIONS 621 DEGRAW STREET BROOKLYN,NY 11217	NONE	P C	GENERAL SUPPORT	60,000	
BRYN MAWR COLLEGE 101 NORTH MARION AVENUE BRYN MAWR,PA 19010	NONE	P C	GENERAL SUPPORT	3,334	
CAMPAIGN LEGAL CENTER 1101 14TH STREET NW SUITE 400 WASHINGTON,DC 20005	NONE	P C	GENERAL SUPPORT	100,000	
CENTER FOR EMPLOYMENT OPPORTUNITIES INC 50 BROADWAY SUITE 1604 NEW YORK,NY 10004	NONE	P C	NEW YORK PROGRAM	25,000	
CENTER FOR REPRODUCTIVE RIGHTS INC 199 WATER STREET NEW YORK,NY 10038	NONE	P C	U.S. PROGRAM	100,000	
CENTRAL PARK CONSERVANCY INC 14 EAST 60TH STREET NEW YORK,NY 10022	NONE	P C	GENERAL SUPPORT	1,250	
CERES INC 99 CHAUNCY STREET 6TH FLOOR BOSTON,MA 02111	NONE	P C	GENERAL SUPPORT	150,000	
CLIMATE & CLEAN ENERGY EQUITY FUND OPEN GOV HUB 1100 13TH STREET NW SUITE 800 WASHINGTON,DC 20005	NONE	P C	GENERAL SUPPORT	200,000	
COLD SPRING HARBOR LABORATORY 1 BUNGTOWN ROAD COLD SPRING HARBOR,NY 11724	NONE	P C	DUCHENNE MUSCULAR DYSTROPHY RESEARCH	5,000	
COMMON CAUSE EDUCATION FUND 805 15TH STREET NW 8TH FLOOR WASHINGTON,DC 20005	NONE	P C	GENERAL SUPPORT	350,000	
COMMUNITY FOUNDATION OF OYSTER BAY PO BOX 329 OYSTER BAY,NY 11771	NONE	P C	GENERAL SUPPORT	1,500	
EARTHJUSTICE PO BOX 194330 SAN FRANCISCO,CA 94119	NONE	P C	CLIMATE AND ENERGY PROGRAM	150,000	
EAST WOODS SCHOOL 31 YELLOW COTE ROAD OYSTER BAY,NY 11771	NONE	P C	GENERAL SUPPORT	3,000	
EQUAL JUSTICE INITIATIVE 122 COMMERCE STREET MONTGOMERY,AL 36104	NONE	P C	GENERAL SUPPORT	10,000	
FAIR COUNT INC PO BOX 170382 ATLANTA,GA 30317	NONE	P C	GENERAL SUPPORT	3,750	
GREENWICH UNITED WAY 2 DEARFIELD DRIVE SUITE 300 GREENWICH,CT 06831	NONE	P C	GENERAL SUPPORT	10,000	
GUTTMACHER INSTITUTE INC 125 MAIDEN LANE 7TH FLOOR NEW YORK,NY 10038	NONE	P C	U.S. PROGRAM	100,000	
HELEN KELLER INTERNATIONAL INC ONE DAG HAMMARSKJOLD PLAZA FLOOR 2 NEW YORK,NY 10017	NONE	P C	VITAMIN A SUPPLEMENTATION PROGRAM AND COMPLEMENTARY ACTIVITIES	20,000	
HUDSON LINK FOR HIGHER EDUCATION IN PRISON INC PO BOX 862 OSSINING,NY 10562	NONE	P C	GENERAL SUPPORT	40,000	
JACKIE ROBINSON FOUNDATION INC 75 VARICK STREET 2ND FLOOR NEW YORK,NY 10013	NONE	P C	GENERAL SUPPORT	20,000	
LAWYERS FOR CHILDREN INC 110 LAFAYETTE STREET 8TH FLOOR NEW YORK,NY 10013	NONE	P C	GENERAL SUPPORT	100,000	
LEAGUE OF CONSERVATION VOTERS EDUCATION FUND 740 15TH STREET NW SUITE 700 WASHINGTON,DC 20005	NONE	P C	GENERAL SUPPORT	150,000	
LEAGUE OF CONSERVATION VOTERS EDUCATION FUND 740 15TH STREET NW SUITE 700 WASHINGTON,DC 20005	NONE	P C	CHISPA PROGRAM	50,000	
LEGAL ACTION CENTER 225 VARICK STREET 4TH FLOOR NEW YORK,NY 10014	NONE	P C	NEW YORK POLICY ADVOCACY	60,000	
LEGAL AID SOCIETY 199 WATER STREET NEW YORK,NY 10038	NONE	P C	IMMIGRANT YOUTH REPRESENTATION PROJECT	100,000	
LIGHTHOUSE GUILD 250 WEST 64TH STREET NEW YORK,NY 10023	NONE	P C	GENERAL SUPPORT	8,000	
LONG ISLAND UNIVERSITY 700 NORTHERN BOULEVARD BROOKVILLE,NY 11548	NONE	P C	CARA GARGANO SCHOLARSHIP	5,000	
LOUISIANA BUCKET BRIGADE 4731 CANAL STREET NEW ORLEANS,LA 70119	NONE	P C	GENERAL SUPPORT	150,000	
MEDIA MATTERS FOR AMERICA PO BOX 44811 WASHINGTON,DC 20026	NONE	P C	GENERAL SUPPORT	3,750	
MUSCULAR DYSTROPHY ASSOCIATION 1016 W JACKSON BLVD 1073 CHICAGO,IL 60607	NONE	P C	DUCHENNE MUSCULAR DYSTROPHY RESEARCH	2,500	
NATIONAL INSTITUTE FOR REPRODUCTIVE HEALTH 14 WALL STREET SUITE 3B NEW YORK,NY 10005	NONE	P C	GENERAL SUPPORT	75,000	
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION 700 CHILDRENS DRIVE COLUMBUS,OH 43205	NONE	P C	DUCHENNE MUSCULAR DYSTROPHY RESEARCH	2,500	
NEO PHILANTHROPY INC 1001 AVENUE OF THE AMERICAS 12TH FLOOR NEW YORK,NY 10018	NONE	P C	AMPLIFY GEORGIA COLLABORATIVE	50,000	
NEO PHILANTHROPY INC 1001 AVENUE OF THE AMERICAS 12TH FLOOR NEW YORK,NY 10018	NONE	P C	STATE INFRASTRUCTURE FUND	400,000	
NEW ECONOMY PROJECT 121 WEST 27TH STREET SUITE 804 NEW YORK,NY 10001	NONE	P C	GENERAL SUPPORT	50,000	
NEW VENTURE FUND 1828 L STREET NW SUITE 300-A WASHINGTON,DC 20036	NONE	P C	ABORTION ON OUR OWN TERMS	100,000	
NEW VENTURE FUND 1828 L STREET NW SUITE 300-A WASHINGTON,DC 20036	NONE	P C	TRUSTED ELECTIONS FUND	300,000	
NEW VENTURE FUND 1828 L STREET NW SUITE 300-A WASHINGTON,DC 20036	NONE	P C	TRUSTED ELECTIONS FUND	100,000	
NEW VENTURE FUND 1828 L STREET NW SUITE 300-A WASHINGTON,DC 20036	NONE	P C	TRUSTED ELECTIONS FUND	20,000	
PACIFIC ENVIRONMENT 1012 TORNEY AVENUE SAN FRANCISCO,CA 94129	NONE	P C	GENERAL SUPPORT	75,000	
PARAPROFESSIONAL HEALTHCARE INSTITUTE INC (PHI) 261 MADISON AVENUE SUITE 913 NEW YORK,NY 10016	NONE	P C	NEW YORK STATE POLICY INITIATIVE	50,000	
PHILANTHROPY NEW YORK 320 EAST 43RD STREET NEW YORK,NY 10017	NONE	P C	GENERAL SUPPORT	7,250	
PHYSICIANS FOR REPRODUCTIVE HEALTH INC PO BOX 35 HARTSDALE,NY 10530	NONE	P C	GENERAL SUPPORT	100,000	
PLANNED PARENTHOOD OF GREATER NEW YORK 26 BLEECKER STREET NEW YORK,NY 10012	NONE	P C	GENERAL SUPPORT	75,000	
PRESIDENT AND FELLOWS OF MIDDLEBURY COLLEGE 152 MAPLE STREET MIDDLEBURY,VT 05753	NONE	P C	GENERAL SUPPORT	3,334	
PROTEUS FUND 275 MADISON AVENUE SUITE 600 NEW YORK,NY 10016	NONE	P C	PIPER FUND	200,000	
RAINFOREST ACTION NETWORK 425 BUSH STREET SUITE 300 SAN FRANCISCO,CA 94108	NONE	P C	GENERAL SUPPORT	250,000	
REPRODUCTIVE HEALTH ACCESS PROJECT INC PO BOX 21191 NEW YORK,NY 10025	NONE	P C	GENERAL SUPPORT	75,000	
RUTGERS UNIVERSITY FOUNDATION 335 GEORGE STREET NEW BRUNSWICK,NJ 08901	NONE	P C	DUCHENNE MUSCULAR DYSTROPHY RESEARCH	5,000	
SAVE THE RHINO INTERNATIONAL INC 1350 AVENUE OF THE AMERICAS SUITE 226 NEW YORK,NY 10019	NONE	P C	HLUHLUWE-IMFOLOZI PARK/UMKHUZE GAME RESERVE IN SOUTH AFRICA	6,666	
SD FOUNDATION DBA VOTING RIGHTS LAB 611 PENNSYLVANIA AVENUE SE WASHINGTON,DC 20003	NONE	P C	GENERAL SUPPORT	150,000	
SD FOUNDATION DBA VOTING RIGHTS LAB 611 PENNSYLVANIA AVENUE SE WASHINGTON,DC 20003	NONE	P C	GENERAL SUPPORT OF RAPID RESPONSE EFFORTS	50,000	
SEARCH FOR CHANGE 460 COLUMBUS AVENUE SUITE 201E VALHALLA,NY 10595	NONE	P C	GENERAL SUPPORT	10,000	
STANDEARTH 548 MARKET STREET SUITE 74196 SAN FRANCISCO,CA 94104	NONE	P C	GENERAL SUPPORT	300,000	
THE DOOR - A CENTER OF ALTERNATIVES INC 555 BROOME STREET NEW YORK,NY 10013	NONE	P C	LEGAL SERVICES CENTER	70,000	
THE NEW YORK IMMIGRATION COALITION INC 131 WEST 33RD STREET SUITE 610 NEW YORK,NY 10001	NONE	P C	GENERAL SUPPORT	225,000	
THE NEW ORLEANS JAZZ AND HERITAGE FOUNDATION 1205 N RAMPART STREET NEW ORLEANS,LA 70116	NONE	P C	GENERAL SUPPORT	1,250	
THE SENTENCING PROJECT 1150 CONNECTICUT AVENUE NW SUITE 601 WASHINGTON,DC 20036	NONE	P C	VOTING RIGHTS	50,000	
TRUSTEES OF BOSTON UNIVERSITY WBUR 890 COMMONWEALTH AVENUE 3RD FLOOR BOSTON,MA 02215	NONE	P C	WBUR	15,000	
TRUSTEES OF COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK 1150 ST NICHOLAS AVENUE NEW YORK,NY 10032	NONE	P C	NAOMI BERRIE DIABETES CENTER	20,000	
TRUSTEES OF PRINCETON UNIVERSITY 34 CHAMBERS STREET PRINCETON,NJ 08542	NONE	P C	BRIDGING DIVIDES INITIATIVE	200,000	
UNION OF CONCERNED SCIENTISTS INC 2 BRATTLE SQUARE CAMBRIDGE,MA 02138	NONE	P C	CENTER FOR SCIENCE & DEMOCRACY	100,000	
UNISON LEARNING CENTER 9 PARADISE LANE NEW PALTZ,NY 12561	NONE	P C	GRACEFUL AGING PROJECT	10,000	
URGE UNITE FOR REPRODUCTIVE AND GENDER EQUITY 4315 50TH STREET NW SUITE 100 4616 WASHINGTON,DC 20016	NONE	P C	VOTER ENGAGEMENT	150,000	
WATERFRONT ALLIANCE INC 256 WEST 36TH STREET 11TH FLOOR NEW YORK,NY 10018	NONE	P C	CLIMATE RESILIENCE AND ADAPTATION	25,000	
WATERFRONT ALLIANCE INC 256 WEST 36TH STREET 11TH FLOOR NEW YORK,NY 10018	NONE	P C	COASTAL RESILIENCY COMMUNITY ORGANIZER	50,000	
WATERFRONT ALLIANCE INC 256 WEST 36TH STREET 11TH FLOOR NEW YORK,NY 10018	NONE	P C	CLIMATE RESILIENCE AND ADAPTATION	25,000	
WEILL CORNELL MEDICINE OFFICE OF EXTERNAL AFFAIRS 1300 YORK AVENUE BOX 314 NEW YORK,NY 10065	NONE	P C	EGL HOUSE CALL PROGRAM	10,000	
YOUTH AND FAMILY COUNSELING AGENCY OF OYSTER BAY - EAST NORWICH INC 12 IRVING PLACE OYSTER BAY,NY 11771	NONE	P C	GENERAL SUPPORT	2,500	
Total				6,007,084	
b Approved for future payment					
ALL VOTING IS LOCAL 11 DUPONT CIRCLE NW SUITE 575 WASHINGTON,DC 20036	NONE	P C	GENERAL SUPPORT	400,000	
AMERICAN CONSTITUTION SOCIETY 601 13TH STREET NW WASHINGTON,DC 20005	NONE	P C	GENERAL SUPPORT	100,000	
BOSTON CHILDREN'S HOSPITAL 300 LONGWOOD AVENUE BOSTON,MA 02115	NONE	P C	DUCHENNE MUSCULAR DYSTROPHY RESEARCH	60,000	
BLUEGREEN ALLIANCE FOUNDATION 2701 UNIVERSITY AVENUE SE SUITE 209 MINNEAPOLIS,MN 55414	NONE	P C	GENERAL SUPPORT	100,000	
CERES INC 99 CHAUNCY STREET 6TH FLOOR BOSTON,MA 02111	NONE	P C	GENERAL SUPPORT	400,000	
EARTHJUSTICE PO BOX 194330 SAN FRANCISCO,CA 94114	NONE	P C	CLIMATE AND ENERGY PROGRAM	150,000	
GUTTMACHER INSTITUTE INC 125 MAIDEN LANE 7TH FLOOR NEW YORK,NY 10038	NONE	P C	U.S. PROGRAM	100,000	
LEAGUE OF CONSERVATION VOTERS EDUCATION FUND 740 15TH STREET NW SUITE 700 WASHINGTON,DC 20005	NONE	P C	GENERAL SUPPORT	200,000	
LEAGUE OF CONSERVATION VOTERS EDUCATION FUND 740 15TH STREET NW SUITE 700 WASHINGTON,DC 20005	NONE	P C	CHISPA PROGRAM	100,000	
NEO PHILANTHROPY INC 1001 AVENUE OF THE AMERICAS 12TH FLOOR NEW YORK,NY 10018	NONE	P C	AMPLIFY GEORGIA COLLABORATIVE	50,000	
NEW VENTURE FUND 1828 L STREET NW SUITE 300-A WASHINGTON,DC 20036	NONE	P C	ABORTION ON OUR OWN TERMS	100,000	
PACIFIC ENVIRONMENT 1012 TORNEY AVENUE SAN FRANCISCO,CA 94129	NONE	P C	GENERAL SUPPORT	75,000	
PHILANTHROPY NEW YORK 320 EAST 43RD STREET NEW YORK,NY 10017	NONE	P C	GENERAL SUPPORT	4,550	
PHYSICIANS FOR REPRODUCTIVE HEALTH PO BOX 35 HARTSDALE,NY 10530	NONE	P C	GENERAL SUPPORT	200,000	
PROTEUS FUND 275 MADISON AVE SUITE 600 NEW YORK,NY 10016	NONE	P C	PIPER FUND - JUDICIAL INTEGRITY PROGRAM	150,000	
RAINFOREST ACTION NETWORK 425 BUSH STREET SUITE 300 SAN FRANCISCO,CA 94108	NONE	P C	GENERAL SUPPORT	250,000	
THE DOOR - A CENTER OF ALTERNATIVES INC 555 BROOME STREET NEW YORK,NY 10013	NONE	P C	LEGAL SERVICES CENTER	70,000	
WATERFRONT ALLIANCE INC 256 WEST 36TH STREET 11TH FLOOR NEW YORK,NY 10018	NONE	P C	COASTAL RESILIENCE	50,000	
Total				2,559,554	
					Form 990-PF (2024)

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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		14	826,170	
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		18	5,263,378	
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) . .	0		6,089,548	0
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)		13	6,089,548	6,089,548

[illegible]

Part XVI

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

(1) Cash.

(2) Other assets.

b Other transactions:

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization

(3)* Rental of facilities, equipment, or other assets.

(4) Reimbursement arrangements.

(5) Loans or loan guarantees.

(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

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

[illegible]

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

b If "Yes," complete the following schedule.

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

Sign Here

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

2025-10-21

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below?

See instructions. ☐ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

CINDY FEDER

Preparer's Signature

Date _____

Check if self-employed ☐

PTIN

P01342030

Firm's name ► EISNER ADVISORY GROUP LLC

Firm's address ► 733 THIRD AVENUE

NEW YORK, NY 100172703

Phone no.
(212) 949-8700

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2024 IRS 990 e-File Render

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC

EIN: 13-6090843

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EISNER ADVISORY GROUP LLC	28,350	14,175	0	14,175

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC
EIN: 13-6090843

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	2000-04-10	9,307	9,306	SL	5.000000000000	0	0	0	
FURNITURE	2000-05-01	5,334	5,334	SL	7.000000000000	0	0	0	
FURNITURE	2001-06-03	195	194	SL	7.000000000000	0	0	0	
FURNITURE	2002-05-10	407	406	SL	7.000000000000	0	0	0	
COMPUTER SOFTWARE	2002-11-12	12,416	12,416	SL	3.000000000000	0	0	0	
LEASEHOLD IMPROVEMENT	2003-05-30	1,375	721	SL	39.000000000000	35	0	0	
COMPUTER	2003-08-18	6,115	4,586	SL	5.000000000000	0	0	0	
OFFICE EQUIPMENT	2003-12-17	652	488	SL	5.000000000000	0	0	0	
FURNITURE	2003-10-24	581	476	SL	7.000000000000	0	0	0	
COMPUTER SOFTWARE	2005-08-09	938	938	SL	3.000000000000	0	0	0	
OFFICE EQUIPMENT	2005-07-12	560	560	SL	5.000000000000	0	0	0	
FURNITURE	2005-07-28	3,040	3,039	SL	7.000000000000	0	0	0	
LEASEHOLD IMPROVEMENT	2005-10-31	1,400	654	SL	39.000000000000	36	0	0	
COMPUTER SOFTWARE	2006-09-18	3,440	3,440	SL	3.000000000000	0	0	0	
FURNITURE	2006-10-27	333	333	SL	7.000000000000	0	0	0	
FIXTURE	2006-02-28	962	962	SL	7.000000000000	0	0	0	
LEASEHOLD IMPROVEMENT	2006-12-07	125	51	SL	39.000000000000	3	0	0	
COMPUTER	2007-06-08	2,113	2,113	SL	5.000000000000	0	0	0	
COMPUTER SOFTWARE	2007-11-28	3,113	3,113	SL	3.000000000000	0	0	0	
FURNITURE	2007-03-14	2,028	2,028	SL	7.000000000000	0	0	0	
LEASEHOLD IMPROVEMENT	2007-02-12	300	135	SL	39.000000000000	8	0	0	
FURNITURE	2007-07-01	916	916	SL	7.000000000000	0	0	0	
COMPUTER	2004-10-14	2,366	1,858	SL	5.000000000000	0	0	0	
COMPUTER	2008-01-02	1,118	1,118	SL	5.000000000000	0	0	0	
COMPUTER	2008-09-09	714	713	SL	5.000000000000	0	0	0	
COMPUTER SOFTWARE	2008-09-09	3,104	3,104	SL	3.000000000000	0	0	0	
COMPUTER SOFTWARE	2009-09-10	2,829	2,829	SL	3.000000000000	0	0	0	
FURNITURE	2009-11-03	295	294	SL	7.000000000000	0	0	0	
COMPUTER	2010-07-28	508	508	SL	5.000000000000	0	0	0	
COMPUTER	2010-09-22	572	572	SL	5.000000000000	0	0	0	
FURNITURE	2010-02-09	223	223	SL	7.000000000000	0	0	0	
FURNITURE	2011-12-22	431	430	SL	7.000000000000	0	0	0	
COMPUTER	2011-06-01	1,202	1,201	SL	5.000000000000	0	0	0	
LEASEHOLD IMPROVEMENT	2014-10-21	4,580	1,073	SL	39.000000000000	117	0	0	
COMPUTER EQUIPMENT	2016-05-20	7,470	7,470	SL	5.000000000000	0	0	0	
AMAZON NEW SERVER	2018-06-27	795	795	SL	5.000000000000	0	0	0	
LEASEHOLD IMPROVEMENT	2019-09-09	811	91	SL	39.000000000000	21	0	0	
COMPUTER	2020-10-22	1,211	787	SL	5.000000000000	242	0	0	
COMPUTER	2020-11-23	1,792	1,164	SL	5.000000000000	358	0	0	
LEASEHOLD IMPROVEMENT	2020-02-03	810	82	SL	39.000000000000	21	0	0	
COMPUTER	2021-02-02	1,380	805	SL	5.000000000000	276	0	0	

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC
EIN: 13-6090843

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALPHABET INC COM CL C	89,584	640,259
AMETEK INC COM	191,644	761,058
ANALOG DEVICES INC	149,606	168,693
AUTONATION INC COM	245,827	280,746
B & M EUROPEAN VALUE RETAIL SA COM	237,321	227,388
B&M EUROPEAN VALUE RETAIL SA REG SHS ISIN#LU1072616219	187,906	187,873
BANK OF AMERICA CORPORATION COM	124,807	205,510
BANK OZK COM	244,728	254,088
BERKSHIRE HATHAWAY INC COM CL B	283,289	1,013,081
BOOKING HLDGS INC	395,978	556,463
BROWN & BROWN INC	152,697	147,929
CARMAX INC COM	321,283	537,000
CHARLES SCHWAB CORP	145,590	235,870
CONSTELLATION SOFTWARE INC COM	100,819	1,199,823
DISCOVER FINL SVCS	257,521	465,989
DOLLARAMA INC COM	121,661	441,803
DR HORTON INC COM	57,196	95,777
ELEVANCE HEALTH INC COM	499,442	650,002
F&G ANNUITIES & LIFE INC COM	86,729	197,047
FIDELITY NATL FINL INC NEW FNF GROUP	274,307	363,057
FISERV INC	343,268	517,658
FIVE BELOW INC COM	265,874	323,802
FLOOR & DECOR HOLDINGS INC COM CL A	101,296	124,027
FORTUNE BRANDS HOME & SECURITY COM	128,746	174,173
HEICO CORP COM CL A	90,655	547,819
HOWDEN JOINERY GROUP PLC COM	65,645	116,436
INSTALLED BUILDING PRODUCTS IN COM	175,752	289,513
KEYSIGHT TECHNOLOGIES INC COM	143,345	289,776
KINSALE CAP GROUP INC	115,515	116,282
LENNAR CORP CL A	288,813	289,104
LITHIA MTRS INC COM	178,665	233,759
LITTELFUSE INC COM	99,751	89,547
LULULEMON ATHLETICA INC COM	222,093	280,306
M & T BANK CORP COM	251,317	295,928
MARKEL CORP COM	151,283	395,307
MEDPACE HOLDINGS INC	218,101	273,425
META PLATFORMS INC COM CL A	213,660	792,781
MTY FOOD GROUP INC COM	132,183	127,687
NVR INC COM	154,484	523,450
ONEMAIN HLDGS INC COM	372,942	504,775
PRIMERICA INC COM	61,973	248,349
PROGRESSIVE CORP (OHIO) COM	139,318	443,278
RYANAIR HLDGS PLC SPONSORED ADR NEW	291,077	312,933
STARBUCKS CORP	353,330	362,263
TD SYNnex CORP COM	483,401	518,495
TOPICUS.COM INC COM	58,985	100,879
VISA INC COM CL A	105,243	623,231
WALT DISNEY COMPANY (THE) COM	92,006	120,258

TY 2024 IRS 990 e-File Render

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC

EIN: 13-6090843

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
DSM ALL WORLD GROWTH TRUST	AT COST	10,626,895	11,006,535

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC
EIN: 13-6090843

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER	9,307	9,306	1	1
FURNITURE	5,334	5,334	0	0
FURNITURE	195	194	1	1
FURNITURE	407	406	1	1
COMPUTER SOFTWARE	12,416	12,416	0	0
LEASEHOLD IMPROVEMENT	1,375	756	619	619
COMPUTER	6,115	4,586	1,529	1,529
OFFICE EQUIPMENT	652	488	164	164
FURNITURE	581	476	105	105
COMPUTER SOFTWARE	938	938	0	0
OFFICE EQUIPMENT	560	560	0	0
FURNITURE	3,040	3,039	1	1
LEASEHOLD IMPROVEMENT	1,400	690	710	710
COMPUTER SOFTWARE	3,440	3,440	0	0
FURNITURE	333	333	0	0
FIXTURE	962	962	0	0
LEASEHOLD IMPROVEMENT	125	54	71	71
COMPUTER	2,113	2,113	0	0
COMPUTER SOFTWARE	3,113	3,113	0	0
FURNITURE	2,028	2,028	0	0
LEASEHOLD IMPROVEMENT	300	143	157	157
FURNITURE	916	916	0	0
COMPUTER	2,366	1,858	508	508
COMPUTER	1,118	1,118	0	0
COMPUTER	714	713	1	1
COMPUTER SOFTWARE	3,104	3,104	0	0
COMPUTER SOFTWARE	2,829	2,829	0	0
FURNITURE	295	294	1	1
COMPUTER	508	508	0	0
COMPUTER	572	572	0	0
FURNITURE	223	223	0	0
FURNITURE	431	430	1	1
COMPUTER	1,202	1,201	1	1
LEASEHOLD IMPROVEMENT	4,580	1,190	3,390	3,390
COMPUTER EQUIPMENT	7,470	7,470	0	0
AMAZON NEW SERVER	795	795	0	0
LEASEHOLD IMPROVEMENT	811	112	699	699
COMPUTER	1,211	1,029	182	182
COMPUTER	1,792	1,522	270	270
LEASEHOLD IMPROVEMENT	810	103	707	707
COMPUTER	1,380	1,081	299	299

TY 2024 IRS 990 e-File Render

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC

EIN: 13-6090843

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
RENT SECURITY DEPOSIT	11,929	11,929	11,929

TY 2024 IRS 990 e-File Render

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC

EIN: 13-6090843

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	750	0	0	750
BANK CHARGES	327	0	0	327
DUES AND SUBSCRIPTIONS	750	0	0	750
INSURANCE EXPENSE	10,226	0	0	10,226
TELEPHONE EXPENSE	3,168	0	0	3,168
OFFICE EXPENSES & SUPPLIES	2,408	0	0	2,408
PAYROLL EXPENSES	2,401	0	0	2,401
COMPUTER AND INTERNET EXPENSES	6,411	0	0	6,411
INVESTMENT EXPENSE THRU PASS THRU DSM ALL WORLD	88,750	88,750	0	0
ADR FEES	88	88	0	0

TY 2024 IRS 990 e-File Render

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC

EIN: 13-6090843

Description	Beginning of Year - Book Value	End of Year - Book Value
OTHER LIABILITIES	2,164	2,157

TY 2024 IRS 990 e-File Render

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC

EIN: 13-6090843

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	277,840	277,840	0	0
COMPUTER CONSULTANT	4,500	0	0	4,500

TY 2024 IRS 990 e-File Render

Name: BERNARD F & ALVA B GIMBEL FOUNDATION
INC

EIN: 13-6090843

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PERSHING - FOREIGN TAX PAID	2,558	2,558	0	0
SCHWAB - FOREIGN TAX PAID	4,623	4,623	0	0
DSM ALL WORLD GROWTH TRUST	3,854	3,854	0	0
FEDERAL EXCISE TAXES	95,000	0	0	0