

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

Name of foundation RITA ALLEN FOUNDATION INC		A Employer identification number 13-6116429	
Number and street (or P.O. box number if mail is not delivered to street address) PO BOX 116		Room/suite	B Telephone number (see instructions) (609) 683-8010
City or town, state or province, country, and ZIP or foreign postal code PRINCETON, NJ 085421116			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) ▶\$ <u>203,250,624</u>		J Accounting method: ☐ Cash ☐ Accrual ☒ Other (specify) <u>Modified Cash</u> (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	813,781	813,781		
	4 Dividends and interest from securities	1,934,308	2,403,105		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	15,413,258			
	b Gross sales price for all assets on line 6a _____ 60,283,200				
	7 Capital gain net income (from Part IV, line 2)		13,813,322		
	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)	326,208	289,588		
	12 Total. Add lines 1 through 11	18,487,555	17,319,796		
	13 Compensation of officers, directors, trustees, etc.	1,013,493	0		1,013,493
	14 Other employee salaries and wages	551,224	0		551,224
	15 Pension plans, employee benefits	480,973	0		480,973
	16a Legal fees (attach schedule)	6,833	0		6,833
	b Accounting fees (attach schedule)	77,350	0		77,350
	c Other professional fees (attach schedule)	1,269,428	1,211,606		114,500
	17 Interest		22,487		
	18 Taxes (attach schedule) (see instructions)	245,000	39,943		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	120,200	0		120,200
	21 Travel, conferences, and meetings	91,297	0		91,297
	22 Printing and publications	908	0		908
	23 Other expenses (attach schedule)	731,432	425,531		729,669
	24 Total operating and administrative expenses. Add lines 13 through 23	4,588,138	1,699,567		3,186,447
	25 Contributions, gifts, grants paid	5,515,657			5,515,657
	26 Total expenses and disbursements. Add lines 24 and 25	10,103,795	1,699,567		8,702,104
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	8,383,760			
	b Net investment income (if negative, enter -0-)		15,620,229		
	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
Assets	1	Cash—non-interest-bearing		67,733	124,032	124,032
	2	Savings and temporary cash investments		7,142,875	5,999,658	5,999,658
	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)		615,295	459,128	459,128
	b	Investments—corporate stock (attach schedule)		74,885,649	87,168,489	87,168,489
	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)		107,149,518	109,493,264	109,493,264
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)		6,053	6,053	6,053	
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		189,867,123	203,250,624	203,250,624	
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 ▶ _____)				
	23	Total liabilities (add lines 17 through 22).		0	0	
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		186,090,255	199,441,094	
	25	Net assets with donor restrictions		3,776,868	3,809,530	
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds				
	29	Total net assets or fund balances (see instructions)		189,867,123	203,250,624	
30	Total liabilities and net assets/fund balances (see instructions) .		189,867,123	203,250,624		

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)	1 189,867,123
2	Enter amount from Part I, line 27a	2 8,383,760
3	Other increases not included in line 2 (itemize) ▶ _____	3 4,999,741
4	Add lines 1, 2, and 3	4 203,250,624
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.	6 203,250,624

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PUBLICLY TRADED SECURITIES	P		
b COLCHIS INCOME FUND, LTD.	P		
c INDIA ACORN FUND CAYMAN LTD	P		
d YORK CREDIT OPPORTUNITIES	P		
e BOND II, L.P.	P		
BOND III, LP	P		
DALTON INVESTMENTS TRUST - SERIES B	P		
ECHO STREET GOODCO SELECT II LP	P		
FORESITE CAPITAL FUND V,LP	P		
FORESITE CAPITAL FUND VI, L.P.	P		
FORESITE CAPITAL OPPORTUNITY FUND V,LP	P		
FUNDSMITH EQUITY FUND	P		
GQG PARTNERS INTERNATIONAL EQUITY FUND	P		
INNOVATION ENDEAVORS IV, LP	P		
MAREN CAPITAL MAREN FUND LP	P		
MGG SF EVERGREEN UNLEVERED FUND LP	P		
NEW GENERATION TURNAROUND FUND (DELAWARE), LP	P		
NOVALIS LIFESCIENCES INVESTMENTS II, LP	P		
OWLS NEST PARTNERS LONG ONLY FUND, LP	P		
THE OVERLOOK PARTNERS FUND, L.P.	P		
WARBURG PINCUS GLOBAL GROWTH, L.P.	P		
WARBURG PINCUS PRIVATE EQUITY XII(E&P) XII (B), L.P.	P		
WARBURG PINCUS PRIVATE EQUITY XII, L.P.	P		
WCM FOCUSED INTERNATIONAL OPPORTUNITIES	P		

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 48,649,011		35,925,701	12,723,310
b 111,228		96,574	14,654
c 781,290		476,778	304,512
d 403,583		420,521	-16,938
e			-33,319
			-15,771
			207,088
			10,632
			361
			4,313
			-2,213
			127,651
			715,376
			-16,864
			406
			-62,441
			-9,180
			-116,048
			-42,696
			-2,089
			6,902
			-14,743
			82,785
			-52,366

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (i) over col. (j), if any	
a			12,723,310
b			14,654
c			304,512
d			-16,938
e			-33,319
			-15,771
			207,088
			10,632
			361
			4,313
			-2,213
			127,651
			715,376
			-16,864
			406
			-62,441
			-9,180
			-116,048
			-42,696
			-2,089
			6,902
			-14,743
			82,785
			-52,366

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	13,813,322
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	}	3	

Part V

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ 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	217,121
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	217,121
6	Credits/Payments:		
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	300,592
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	50,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	350,592
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	133,471
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. ▶ \$ <u>0</u> (2) On foundation managers. ▶ \$ <u>0</u>			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ <u>0</u>			
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) ▶ <u>NJ, NY</u>			
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 ▶ <u>WWW.RITAALLEN.ORG</u>	13	Yes	
14	The books are in care of ▶ <u>KARI WILLIAMS TREASURER</u> Telephone no. ▶ <u>(609) 683-8010</u> Located at ▶ <u>PO BOX 116 PRINCETON NJ</u> ZIP+4 ▶ <u>085421116</u>			
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
				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):		Yes	No
(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)	Yes	
(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?
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
If "Yes" to 6b, file Form 8870.
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?
b If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

Yes

No

5a(1)

No

5a(2)

No

5a(3)

No

5a(4)

No

5a(5)

No

5b

5d

6a

No

6b

No

7a

No

7b

8

No

Part VII

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

1

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WILLIAM F GADSDEN PO BOX 116 PRINCETON, NJ 085421116	CHAIRPERSON OF THE BOARD 2.00	7,000	0	0
ELIZABETH G CHRISTOPHERSON PO BOX 116 PRINCETON, NJ 085421116	PRESIDENT & CEO 40.00	584,825	88,275	0
KARI A WILLIAMS PO BOX 116 PRINCETON, NJ 085421116	FINANCE, TREASURER 40.00	190,000	45,746	0
KATHERINE BELYI PO BOX 116 PRINCETON, NJ 085421116	SECRETARY/KNOWLEDGE (THRU JULY 2024) 40.00	122,658	17,959	0
ELIZABETH A FISHER PO BOX 116 PRINCETON, NJ 085421116	SECRETARY/PROJECT MGMT (FROM DEC 2024) 40.00	97,010	39,659	0
ANDREW K GOLDEN PO BOX 116 PRINCETON, NJ 085421116	DIRECTOR 1.00	0	0	0
LONDON Y JONES PO BOX 116 PRINCETON, NJ 085421116	DIRECTOR (DECEASED AUGUST 2024) 1.00	0	0	0
RODNEY PRIESTLEY PHD PO BOX 116 PRINCETON, NJ 085421116	DIRECTOR 1.00	4,000	0	0
SAMUEL S-H WANG PHD PO BOX 116 PRINCETON, NJ 085421116	DIRECTOR 1.00	4,000	0	0
SIVAN HONG PO BOX 116 PRINCETON, NJ 085421116	DIRECTOR 1.00	0	0	0
THE HONORABLE THOMAS H KEAN PO BOX 116 PRINCETON, NJ 085421116	DIRECTOR 1.00	0	0	0
CARL NATHAN MD PO BOX 116 PRINCETON, NJ 085421116	DIRECTOR 1.00	4,000	0	0
DAVID NIRENBERG PHD PO BOX 116 PRINCETON, NJ 085421116	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
RANDI CHMIELEWSKI PO BOX 116 PRINCETON, NJ 085421116	STRATEGIC ENGAGEMENT 40.00	214,157	98,772	0
JANIE SCURTI PO BOX 116 PRINCETON, NJ 085421116	EXECUTIVE ASSISTANT 40.00	98,697	45,164	0
TAMIKA DAVIS PO BOX 116 PRINCETON, NJ 085421116	PROGRAM ADMINISTRATI 40.00	83,341	22,931	0
NANCY KOVACEVICH PO BOX 116 PRINCETON, NJ 085421116	GRANTS ADMINISTRATIO 40.00	55,487	7,768	0
ATTAYAH DOUGLAS PO BOX 116 PRINCETON, NJ 085421116	PROGRAM RESEARCH AND 40.00	53,713	7,760	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
THE COLONY GROUP LLC	INVESTMENT MANAGEMENT	526,949
599 LEXINGTON AVENUE 14TH FLOOR NEW YORK,NY 10022		
BROWN ADVISORY MANAGEMENT LLC	INVESTMENT MANAGEMENT	279,282
901 S BOND STREET SUITE 400 BALTIMORE,MD 21231		
RODRIGUEZ COMMUNITY GROUP LLC	HR & STAFFING	65,725
572 S GAYLORD DENVER,CO 80209		
SHAPIRO CAPITAL MANAGEMENT	INVESTMENT MANAGEMENT	58,173
3060 PEACHTREE RD SUITE 1555 ATLANTA,GA 30305		

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 DISCOVERY SCIENCE KNOWLEDGE AND FIELD BUILDING:DISCOVERY SCIENCE KNOWLEDGE AND FIELD BUILDING (EXAMPLES: SCHOLARS VIRTUAL AND IN-PERSON SYMPOSIA, PUBLICATIONS FOR THE FIELD, SCIENCE PHILANTHROPY ALLIANCE, HEALTH RESEARCH ALLIANCE) PAIN RESEARCH KNOWLEDGE AND FIELD BUILDING (EXAMPLES: PAIN SCHOLARS MEETINGS, PAIN RESEARCH FUNDING CALLS, PUBLICATIONS FOR THE FIELD)	229,104
2 CIVIC SCIENCE AND PHILANTHROPY KNOWLEDGE AND FIELD BUILDING:CIVIC SCIENCE KNOWLEDGE AND FIELD BUILDING (EXAMPLES: CIVIC SCIENCE FELLOWS VIRTUAL AND IN-PERSON LABS AND CONVENINGS, PRACTICE AND SCIENCE OF CIVIC SCIENCE ADVISORY COMMITTEE, CIVIC SCIENCE FELLOWS PROGRAM ADMINISTRATION AND PARTNERSHIPS DEVELOPMENT, CIVIC SCIENCE HUB AND RESOURCES, RESEARCH AND PUBLICATIONS FOR THE FIE LD, CIVIC SCIENCE NEWSLETTER, SCIENCE IN SOCIETY FUNDER COLLABORATIVE, OPEN RESEARCH FUNDERS GROUP, TRANSFORMING EVIDENCE NETWORK) OTHER PHILANTHROPY KNOWLEDGE AND FIELD BUILDING (EXAMPLES: FUND FOR SHARED INSIGHT, MEDIA IMPACT FUNDERS, PHILANTHROPY FOR ACTIVE CIVICENGAGEMENT)	900,339
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	191,748,626
b	Average of monthly cash balances.	1b	7,374,149
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	199,122,775
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	199,122,775
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	2,986,842
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	196,135,933
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	9,806,797

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	9,806,797
2a	Tax on investment income for 2024 from Part V, line 5.	2a	217,121
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	217,121
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	9,589,676
4	Recoveries of amounts treated as qualifying distributions.	4	692
5	Add lines 3 and 4.	5	9,590,368
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	9,590,368

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	8,702,104
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	8,702,104

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				9,590,368
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.			8,089,092	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2024:				
a From 2019.				
b From 2020.				
c From 2021.				
d From 2022.				
e From 2023.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ 8,702,104				
a Applied to 2023, but not more than line 2a			8,089,092	
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				613,012
e Remaining amount distributed out of corpus	0			
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	0			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 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				8,977,356
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)	0			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9:				
a Excess from 2020				
b Excess from 2021				
c Excess from 2022.				
d Excess from 2023				
e Excess from 2024				

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Part 2 Supplementary Information (continued)				
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	Approval status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN ACADEMY OF ARTS AND SCIENCES 136 IRVING STREET NORTONS WOODS CAMBRIDGE,MA 02138	N/A	P/C	BRIDGING THE GAP BETWEEN SCIENCE AND THE PUBLIC	25,000
AMERICAN ASSOCIATION FOR THE ADVANCEMENT OF SCIENCE 1200 NEW YORK AVENUE NW WASHINGTON,D.C 20005	N/A	P/C	BRINGING AI EXPERTISE TO THE FEDERAL GOVERNMENT	50,000
AMERICAN ASSOCIATION FOR THE ADVANCEMENT OF SCIENCE 1200 NEW YORK AVENUE NW WASHINGTON,D.C 20005	N/A	P/C	STEMM OPPORTUNITY ALLIANCE	50,000
AMERICAN PHYSICAL SOCIETY ONE PHYSICS ELLIPSE COLLEGE PARK,MD 207403844	N/A	P/C	CIVIC SCIENCE FELLOW	37,500
ASSOCIATION OF SCIENCE-TECHNOLOGY CENTERS (ASTC) 818 CONNECTICUT AVENUE NW 7TH FLOOR WASHINGTON,D.C 20006	N/A	P/C	CIVIC SCIENCE FELLOW	29,730
BAYLOR COLLEGE OF MEDICINE ONE BAYLOR PLAZA MAIL STOP BCM100 HOUSTON,TX 77030	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	50,000
BOSTON CHILDREN'S HOSPITAL TRUST BOSTON CHILDREN'S HOSPITAL 401 PARK DRIVE BOSTON,MA 02215	N/A	P/C	PROJECT SUPPORT	13,000
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON,MA 02215	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
BOSTON UNIVERSITY COLLEGE OF COMMUNICATION 1 SILBER WAY 9TH FLOOR BOSTON,MA 02215	N/A	P/C	GENERAL SUPPORT	2,500
BOSTON UNIVERSITY COLLEGE OF COMMUNICATION 1 SILBER WAY 9TH FLOOR BOSTON,MA 02215	N/A	P/C	GENERAL SUPPORT	2,500
BRANDEIS UNIVERSITY (WM) 415 SOUTH STREET MALLSTOP 110 WALTHAM,MA 02454	N/A	P/C	ANNUAL SUPPORT	190,000
BROWN UNIVERSITY (PRIMARY) 1 PROSPECT STREET PO BOX 1860 PROVIDENCE,RI 029121860	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
CALIFORNIA COUNCIL ON SCIENCE AND TECHNOLOGY 1017 L ST 438 SACRAMENTO,CA 95814	N/A	P/C	GENERAL SUPPORT	8,000
CALIFORNIA INSTITUTE OF TECHNOLOGY 3531 ARMS LABORATORY MC 206-31 PASADENA,CA 91125	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
CIENCIA PUERTO RICO 55 HIGHT LANE HAMDEN,CT 06517	N/A	P/C	CIVIC SCIENCE PROGRAM	50,000
CIENCIA PUERTO RICO 55 HIGHT LANE HAMDEN,CT 06517	N/A	P/C	GENERAL SUPPORT	750
CIENCIA PUERTO RICO 55 HIGHT LANE HAMDEN,CT 06517	N/A	P/C	CIVIC SCIENCE FELLOW	70,336
CLIMATE CENTRAL ONE PALMER SQUARE SUITE 330 PRINCETON,NJ 08542	N/A	P/C	CIVIC SCIENCE FELLOW	60,000
COLD SPRING HARBOR LABORATORY ONE BUNGTOWN ROAD COLD SPRING HARBOR,NY 11724	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
COLUMBIA UNIVERSITY 535 WEST 116TH STREET STE 202 NEW YORK,NY 10027	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
CORNELL UNIVERSITY OFFICE OF SPONSORED PROGRAMS 373 PINE TREE ROAD EAST HILL PLAZA ITHACA,NY 14853	N/A	P/C	CIVIC SCIENCE FELLOW	60,000
COUNCIL FOR THE ADVANCEMENT OF SCIENCE WRITING PO BOX 910 HEDGESVILLE,WV 25427	N/A	P/C	GENERAL SUPPORT	11,500
COUNCIL ON FOUNDATIONS 1255 23RD ST NW SUITE 200 WASHINGTON,D.C 20037	N/A	P/C	GENERAL SUPPORT	9,000
FALLING WALLS FOUNDATION GMBH KOCHSTRASSE 6/7 BERLIN 10969 GM	N/A	P/C	FALLING WALLS CIRCLE PLENARY TABLE	50,000
HARVARD MEDICAL SCHOOL 25 SHATTUCK STREET BOSTON,MA 02115	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
HARVARD MEDICAL SCHOOL 25 SHATTUCK STREET BOSTON,MA 02115	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	110,000
HARVARD UNIVERSITY MASSACHUSETTS HALL CAMBRIDGE,MA 02138	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	110,000
INSTITUTE FOR ADVANCED STUDY 1 EINSTEIN DRIVE PRINCETON,NJ 08540	N/A	P/C	CIVIC SCIENCE FELLOW	100,000
JOHNS HOPKINS UNIVERSITY 2715 NORTH CHARLES STREET BALTIMORE,MD 21218	N/A	P/C	THE FUTURE OF SCIENCE IS CIVIC	63,000
KAISER FAMILY FOUNDATION 185 BERRY STREET SUITE 2000 SAN FRANCISCO,CA 94107	N/A	P/C	2024 HEALTH COVERAGE FELLOWSHIP - GENERAL SUPPORT	15,000
LEGACY OF HOPE 1939 FAIRMONT AVE PHILADELPHIA,PA 19130	N/A	P/C	GENERAL OPERATING SUPPORT	131
LEGACY OF HOPE 1939 FAIRMONT AVE PHILADELPHIA,PA 19130	N/A	P/C	GENERAL OPERATING SUPPORT	52
MASSACHUSETTS INSTITUTE OF TECHNOLOGY DEPT OF BIOLOGY CAMBRIDGE,MA 021394307	N/A	P/C	BUILDING TRUST IN SCIENCE: CONFERENCE FOR A MORE INFORMED FUTURE	30,000
MCGILL UNIVERSITY (PRIMARY PAIN) 845 SHERBROOKE ST WEST JAMES ARDIN BLDG 2ND FLOOR MONTREAL,QUEBEC H3A 0G4 CA	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	50,000
MEDIA IMPACT FUNDERS 200 WEST WASHINGTON SQUARE STE 200 PHILADELPHIA,PA 19106	N/A	P/C	PROJECT SUPPORT	25,000
MEDIA IMPACT FUNDERS 200 WEST WASHINGTON SQUARE STE 200 PHILADELPHIA,PA 19106	N/A	P/C	GENERAL OPERATING SUPPORT	25,000
MEDIA IMPACT FUNDERS 200 WEST WASHINGTON SQUARE STE 200 PHILADELPHIA,PA 19106	N/A	P/C	GENERAL SUPPORT	15,000
MEMORIAL SLOAN KETTERING CANCER CENTER (PRIMARY) 1275 YORK AVENUE NEW YORK,NY 10065	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
MONTCLAIR STATE UNIVERSITY FOUNDATION 1 NORMAL AVENUE MONTCLAIR,NJ 07043	N/A	P/C	CENTER FOR COOPERATIVE MEDIA CIVIC SCIENCE FELLOW	43,399
MULTIPLIER 548 MARKET ST SAN FRANCISCO,CA 941045401	N/A	P/C	CIVIC SCIENCE FUNDERS COLLABORATIVE	200,000
NATIONAL ACADEMY OF SCIENCES 500 FIFTH ST WASHINGTON,D.C 20001	N/A	P/C	IMPLICATIONS OF RECENT SUPREME COURT DECISIONS FOR AGENCY DECISION-MAKING	25,000
NATIONAL ACADEMY OF SCIENCES 500 FIFTH STREET NW WASHINGTON,D.C 20001	N/A	P/C	STANDING COMMITTEE ON ADVANCING SCIENCE COMMUNICATION	100,000
NATIONAL SCIENCE POLICY NETWORK 548 MARKET ST SAN FRANCISCO,CA 941045401	N/A	P/C	GENERAL SUPPORT	1,000
NORTH CAROLINA CENTRAL UNIVERSITY FOUNDATION 1801 FAYETTEVILLE STREET DURHAM,NC 27707	N/A	P/C	GENERAL SUPPORT	500
PACE (PHILANTHROPY FOR ACTIVE CIVIC ENGAGEMENT) 1717 RHODE ISLAND AVE NW SUITE 700 WASHINGTON,D.C 20036	N/A	P/C	CIVIC LANGUAGE PERCEPTIONS PROJECT	25,000
PHILANTHROPY NEW YORK 1500 BROADWAY 7TH FLOOR NEW YORK,NY 10036	N/A	P/C	GENERAL SUPPORT	750
RESEARCH FOUNDATION CUNY OBO ADVANCED SCIENCE RESEARCH CENTER 85 SAINT NICHOLAS TERRACE NEW YORK,NY 100311264	N/A	P/C	CIVIC SCIENCE FELLOW	60,000
RESEARCHAMERICA 241 18TH ST SOUTH SUITE 501 ALEXANDRIA,VA 22202	N/A	P/C	SETTING A STRATEGIC COURSE FOR CIVIC SCIENCE	75,000
RESEARCHAMERICA 241 18TH ST SOUTH SUITE 501 ALEXANDRIA,VA 22202	N/A	P/C	CIVIC SCIENCE PROGRAM	25,000
RESEARCHAMERICA 241 18TH ST SOUTH SUITE 501 ALEXANDRIA,VA 22202	N/A	P/C	STAC TASK FORCE TO ADVANCE U.S. COMPETITIVENESS IN THE 21ST CENTURY	175,000
RICE UNIVERSITY'S BAKER INSTITUTE FOR PUBLIC POLICY 6100 MAIN STREET SUITE 120 HOUSTON,TX 77005	N/A	P/C	CIVIC SCIENCE FELLOW	35,000
ROCKEDU SCIENCE OUTREACH AT THE ROCKEFELLER UNIVERSITY 1230 YORK AVE PO BOX 53 NEW YORK,NY 10065	N/A	P/C	CIVIC SCIENCE FELLOW	105,000
ROCKEFELLER UNIVERSITY - CENTER FOR CLINICAL AND TRANSLATIONAL SCIENCE 1230 YORK AVE SUITE 123 NEW YORK,NY 10065	N/A	P/C	CIVIC SCIENCE FELLOW	90,000
ROCKEFELLER UNIVERSITY (PRIMARY) 1230 YORK AVE SUITE 123 NEW YORK,NY 10065	N/A	P/C	PROJECT SUPPORT	20,000
ROSALIND FRANKLIN SOCIETY 140 HUGUENOT STREET NEW ROCHELLE,NY 10801	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	110,000
RUTGERS THE STATE UNIVERSITY OF NEW JERSEY 33 KNIGHTSBRIDGE RD 2ND FLOOR EAST PISCATAWAY,NJ 08854	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	50,000
RUTGERS THE STATE UNIVERSITY OF NEW JERSEY 33 KNIGHTSBRIDGE RD 2ND FLOOR EAST PISCATAWAY,QUEBEC 08854 CA	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	50,000
RUTGERS THE STATE UNIVERSITY OF NJ 191 RYDERS LANE NEW BRUNSWICK,NJ 08901	N/A	P/C	EAGLETON INSTITUTE CIVIC SCIENCE FELLOW	39,750
SALK INSTITUTE FOR BIOLOGICAL STUDIES PO BOX 85800 SAN DIEGO,CA 92186	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
SCIENCE COMMUNICATION LAB INC 600 16TH ST STE 2240 SAN FRANCISCO,CA 94143	N/A	P/C	CIVIC SCIENCE FELLOW	56,048
SCIENCE FRIDAY INITIATIVE 19 W 44TH STREET SUITE 412 NEW YORK,NY 10036	N/A	P/C	INCREASING ACCESS TO SCIENCE POLICY REPORTING	50,000
SCIENCE PHILANTHROPY ALLIANCE 160 FIFTH AVENUE 7TH FLOOR NEW YORK,NY 10010	N/A	P/C	GENERAL SUPPORT	10,000
SIGMA XI THE SCIENTIFIC RESEARCH HONOR SOCIETY PO BOX 13975 RESEARCH TRIANGLE PARK,NC 27709	N/A	P/C	GENERAL SUPPORT	10,000
ST BALDRICK'S FOUNDATION 1333 SOUTH MAYFLOWER AVE SUITE 400 MONROVIA,CA 91016	N/A	P/C	GENERAL SUPPORT	51
STANFORD UNIVERSITY OFFICE OF THE PRESIDENT BUILDING 10 STANFORD,CA 94305	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
STANFORD UNIVERSITY OFFICE OF THE PRESIDENT BUILDING 10 STANFORD,CA 94305	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
STANFORD UNIVERSITY OFFICE OF THE PRESIDENT BUILDING 10 STANFORD,CA 94305	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
STANFORD UNIVERSITY OFFICE OF THE PRESIDENT BUILDING 10 STANFORD,CA 94305	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
STELLENBOSCH UNIVERSITY SOUTH AFRICA KROTOA BUILDING 2048 RYNEVELD STREET STELLENBOSCH,WESTERN CAPE 7600 SF	N/A	P/C	CIVIC SCIENCE IN SOUTH AFRICA	25,000
STEM FROM DANCE INC 315 EMPIRE BOULEVARD STE 250562 BROOKLYN,NY 11225	N/A	P/C	GENERAL SUPPORT	300
STONY BROOK FOUNDATION 230 ADMINISTRATION STONY BROOK UNIVERSITY STONY BROOK,NY 117941188	N/A	P/C	SCIENCE COMMUNICATION FOR SCIENTISTS	25,000
THE ASPEN INSTITUTE 2300 N STREET NW SUITE 700 WASHINGTON,D.C 20037	N/A	P/C	SCIENCE AT THE BALLOT BOX: WHATS AT STAKE FOR SCIENCE	30,000
THE COMMUNICATIONS NETWORK 1717 N NAPER BLVD SUITE 200-20 NAPERVILLE,IL 60563	N/A	P/C	CIRCLES	15,000
THE JOHNS HOPKINS UNIVERSITY JOHNS HOPKINS UNIVERSITY 242 GARLAND HALL 3400 N CHARLES STREET BALTIMORE,MD 21218	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	110,000
THE KAVLI CENTER FOR ETHICS SCIENCE AND THE PUBLIC 1608 FOURTH STREET SUITE 220 BERKELEY,CA 947101749	N/A	P/C	CIVIC SCIENCE FELLOW	65,000
THE KAVLI CENTER FOR ETHICS SCIENCE AND THE PUBLIC 1608 FOURTH STREET SUITE 220 BERKELEY,CA 947101749	N/A	P/C	CIVIC SCIENCE FELLOW	50,000
THE KNOWLEDGE HOUSE FELLOWSHIP INC 26 BRUCKNER BLVD BRONX,NY 10454	N/A	P/C	CIVIC SCIENCE FELLOW	50,000
THE PENNSYLVANIA STATE UNIVERSITY 2583 GATEWAY DR SUITE 130 STATE COLLEGE,PA 168013098	N/A	P/C	GENERAL SUPPORT	50
THE REGENTS OF THE UNIVERSITY OF CALIFORNIA BERKELEY 1608 FOURTH STREET SUITE 220 BERKELEY,CA 947101749	N/A	P/C	DATA INNOVATION LAB CIVIC SCIENCE FELLOW	10,103
THE ROCKEFELLER UNIVERSITY (PRIMARY) 1230 YORK AVENUE NEW YORK,NY 10065	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
THE ROCKEFELLER UNIVERSITY (PRIMARY) 1230 YORK AVENUE NEW YORK,NY 10065	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	100,000
THE STEM ADVOCACY INSTITUTE INC 6 LIBERTY SQ PMB 255 BOSTON,MA 02109	N/A	P/C	CIVIC SCIENCE MEDIA LAB	25,000
THE STEM ADVOCACY INSTITUTE INC 6 LIBERTY SQ PMB 255 BOSTON,MA 02109	N/A	P/C	CIVIC SCIENCE FELLOW	20,000
THE UNIVERSITY OF TEXAS AT DALLAS 800 W CAMPBELL ROAD RICHARDSON,TX 750803021	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	50,000
TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA ANNENBERG PUBLIC POLICY CENTER 202 S 36TH STREET PHILADELPHIA,PA 19104	N/A	P/C	CIVIC SCIENCE FELLOWS PROGRAM	34,000
TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA ANNENBERG PUBLIC POLICY CENTER 202 S 36TH STREET PHILADELPHIA,PA 19104	N/A	P/C	ANNENBERG PUBLIC POLICY CENTER CIVIC SCIENCE FELLOW	16,018
TUFTS UNIVERSITY RESEARCH ADMINISTRATION 136 HARRISON AVE BOSTON,MA 021111817	N/A	P/C	CIVIC SCIENCE FELLOWSHIP NETWORK SUPPORT	30,389
UP FOUNDATION INC PO BOX 14425 GAINESVILLE,FL 326049949	N/A	P/C	GENERAL SUPPORT	4,000
UNITED JEWISH APPEAL (WM) 130 EAST 59TH STREET NEW YORK,NY 10022	N/A	P/C	GENERAL SUPPORT	95,000
UNITED STATES ASSOCIATION FOR THE STUDY OF PAIN 7 GLADDEN ROAD ANNAPOLIS,MD 21401	N/A	P/C	PROJECT SUPPORT	1,000
UNITED STATES ASSOCIATION FOR THE STUDY OF PAIN 7 GLADDEN ROAD ANNAPOLIS,MD 21401	N/A	P/C	GENERAL SUPPORT	15,000
UNIVERSITY OF CALIFORNIA SAN FRANCISCO 600 16TH STREET SAN FRANCISCO,CA 94158	N/A	P/C	GENERAL SUPPORT	5,000
UNIVERSITY OF CALIFORNIA SAN FRANCISCO SCHOOL OF MEDICINE 513 PARNASSUS AVENUE SAN FRANCISCO,CA 941430410	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	110,000
UNIVERSITY OF MICHIGAN 2074 FLEMING ADMINISTRATION BUILDING 503 THOMPSON STREET ANN ARBOR,MI 481091340	N/A	P/C	RITA ALLEN FOUNDATION SCHOLARS PROGRAM	110,000
UNIVERSITY OF RHODE ISLAND FOUNDATION 79 UPPER COLLEGE ROAD KINGSTON,RI 02881	N/A	P/C	GENERAL SUPPORT	250
UNIVERSITY				

Part XV-A

1 Program service revenue:

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

13 Total. Add line 12, columns (b), (d), and (e). **13** 18,487,555

(See worksheet in line 13 instructions to verify calculations.)

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	
		14	813,781	
		14	1,934,308	
		14	325,516	
		18	15,413,258	
		01	692	
	0		18,487,555	

Part XV-B

[illegible]

Part XVI

Yes

10

b If "Yes," complete the following schedule.

Form **990-PF** (2024)

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: RITA ALLEN FOUNDATION INC

EIN: 13-6116429

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FINANCIAL STATEMENT AUDIT AND TAX RETURNS PREPARATION	47,350	0		47,350
BOOKKEEPING	30,000	0		30,000

Name: RITA ALLEN FOUNDATION INC
EIN: 13-6116429

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABORATORIES 3029 SHARES	342,610	342,610
ACCENTURE PLC 844 SHARES	296,911	296,911
ADOBE INC 2047 SHARES	910,260	910,260
ADOBE INC 751 SHARES	333,955	333,955
AGILENT TECHNOLOGIES INC 6089 SHARES	817,996	817,996
AIRBNB INC 2100 SHARES	275,960	275,960
ALIGN TECHNOLOGY INC 2837 SHARES	591,542	591,542
ALPHABET INC 10234 SHARES	1,937,295	1,937,295
ALPHABET INC 13607 SHARES	2,591,316	2,591,316
ALPHABET INC 2230 SHARES	424,680	424,680
ALPHABET INC 3027 SHARES	576,461	576,461
AMAZON.COM INC 14285 SHARES	3,133,986	3,133,986
AMAZON.COM INC 4937 SHARES	1,083,128	1,083,128
AMER SPORTS INC 51825 SHARES	1,449,027	1,449,027
AMERICAN INTERNATIONAL GROUP 14622 SHARES	1,064,482	1,064,482
ANALOG DEVICES INC 4217 SHARES	895,944	895,944
APPLE INC 1665 SHARES	416,949	416,949
APPLE INC 9382 SHARES	2,349,440	2,349,440
AUTODESK INC 4041 SHARES	1,194,398	1,194,398
AXALTA COATING SYSTEMS LTD 5100 SHARES	174,522	174,522
BAKER HUGHES CO 21898 SHARES	898,256	898,256
BANK OF AMERICA CORP 17561 SHARES	771,806	771,806
BANK OF AMERICA CORP 9600 SHARES	421,920	421,920
BAXTER INTERNATIONAL INC 12500 SHARES	364,500	364,500
BERKSHIRE HATHAWAY INC 5807 SHARES	2,632,197	2,632,197
BERKSHIRE HATHAWAY INC 910 SHARES	412,485	412,485
BLACKSTONE INC 2970 SHARES	512,087	512,087
BOOKING HOLDINGS INC 345 SHARES	1,714,105	1,714,105
BRIGHT HORIZONS FAMILY Solutio 5266 SHARES	583,736	583,736
CANADIAN NATIONAL RAILWAY CO 6352 SHARES	644,792	644,792
CARMAX INC 8739 SHARES	714,501	714,501
CARRIER GLOBAL CORP 13752 SHARES	938,712	938,712
CORNING INC 3650 SHARES	173,448	173,448
COSTAR GROUP INC 1781 SHARES	127,502	127,502
DANAHER CORP 2951 SHARES	677,402	677,402
DEVON ENERGY CORP 6500 SHARES	212,745	212,745
DUN & BRADSTREET HOLDINGS INC 14400 SHARES	179,424	179,424
EDWARDS LIFESCIENCES CORP 20088 SHARES	1,487,115	1,487,115
ELANCO ANIMAL HEALTH INC 35200 SHARES	426,272	426,272
ELEVANCE HEALTH INC 2828 SHARES	1,043,249	1,043,249
ELI LILLY & CO 355 SHARES	274,060	274,060
FERGUSON ENTERPRISES INC 5219 SHARES	905,862	905,862
FIRST CITIZENS BANCSHARES INC/ 744 SHARES	1,572,087	1,572,087

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FISERV INC 8434 SHARES	1,732,512	1,732,512
GARTNER INC 260 SHARES	125,962	125,962
GE AEROSPACE 4695 SHARES	783,079	783,079
GRAPHIC PACKAGING HOLDING CO 14100 SHARES	382,956	382,956
ILLUMINA INC 4833 SHARES	645,834	645,834
INTUIT INC 2179 SHARES	1,369,502	1,369,502
ISHARES CORE S&P 500 ETF 9,374.0000 SHARES	1,500,545	1,500,545
KKR & CO INC 23093 SHARES	3,415,686	3,415,686
KLA CORP 927 SHARES	584,121	584,121
L3HARRIS TECHNOLOGIES INC 1765 SHARES	371,144	371,144
LIONS GATE ENTERTAINMENT CORP 45000 SHARES	339,750	339,750
LOWE'S COS INC 2906 SHARES	717,201	717,201
MASTERCARD INC 6099 SHARES	3,211,550	3,211,550
MASTERCARD INC 850 SHARES	447,585	447,585
META PLATFORMS INC 5758 SHARES	3,371,367	3,371,367
MICRON TECHNOLOGY INC 4625 SHARES	389,240	389,240
MICROSOFT CORP 10701 SHARES	4,510,472	4,510,472
MICROSOFT CORP 1591 SHARES	670,607	670,607
MOHAWK INDUSTRIES INC 1950 SHARES	232,304	232,304
MSCI INC 525 SHARES	315,005	315,005
NASDAQ INC 4740 SHARES	366,449	366,449
NCR VOYIX CORP 28500 SHARES	394,440	394,440
NETFLIX INC 472 SHARES	420,703	420,703
NOMAD FOODS LTD 38921 SHARES	653,094	653,094
NOVO NORDISK A/S ADR 1506 SHARES	129,546	129,546
OKTA INC 3655 SHARES	288,014	288,014
ORACLE CORP 2820 SHARES	469,925	469,925
PAYCOM SOFTWARE INC 767 SHARES	157,212	157,212
PENN ENTERTAINMENT INC 19600 SHARES	388,472	388,472
PINTEREST INC 12200 SHARES	353,800	353,800
PROGRESSIVE CORP/THE 4668 SHARES	1,118,499	1,118,499
SENSATA TECHNOLOGIES HOLDING P 10600 SHARES	290,440	290,440
SERVICENOW INC 415 SHARES	439,950	439,950
SHOPIFY INC 4089 SHARES	434,783	434,783
SS&C TECHNOLOGIES HOLDINGS INC 4600 SHARES	348,588	348,588
SUNCOR ENERGY INC 33243 SHARES	1,186,110	1,186,110
TAIWAN SEMICONDUCTOR MANUFACTU ADR 12939 SHARES	2,555,323	2,555,323
THERMO FISHER SCIENTIFIC INC 652 SHARES	339,190	339,190
TJX COS INC/THE 8928 SHARES	1,078,592	1,078,592
T-MOBILE US INC 4686 SHARES	1,034,341	1,034,341
TOPGOLF CALLAWAY BRANDS CORP 25900 SHARES	203,574	203,574
UBER TECHNOLOGIES INC 12076 SHARES	728,424	728,424
ULTRA CLEAN HOLDINGS INC 4700 SHARES	168,965	168,965
UNITED RENTALS INC 2058 SHARES	1,449,738	1,449,738
UNITEDHEALTH GROUP INC 305 SHARES	154,287	154,287
UNITEDHEALTH GROUP INC 4830 SHARES	2,443,304	2,443,304
VISA INC 10297 SHARES	3,254,264	3,254,264

Name of Stock	End of Year Book Value	End of Year Fair Market Value
VISA INC 1617 SHARES	511,037	511,037
WALT DISNEY CO/THE 4400 SHARES	489,940	489,940
WORKDAY INC 2534 SHARES	653,848	653,848
WORKDAY INC 999 SHARES	257,772	257,772
ZIMMER BIOMET HOLDINGS INC 3990 SHARES	421,464	421,464
ZOETIS INC 1957 SHARES	318,854	318,854

TY 2024 IRS 990 e-File Render

Name: RITA ALLEN FOUNDATION INC

EIN: 13-6116429

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

459,128

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

459,128

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

0

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

0

Name: RITA ALLEN FOUNDATION INC
EIN: 13-6116429

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ARGYLE	FMV	1,977,942	1,977,942
BOND CAPITAL FUND LP	FMV	1,551,327	1,551,327
BOND II, LP	FMV	816,211	816,211
BOND III, LP	FMV	402,634	402,634
COLCHIS INCOME FUND LTD	FMV	147,588	147,588
DALTON ASIA PACIFIC	FMV	2,941,200	2,941,200
DG VALUE PARTNERS II OFFSHORE FUND	FMV	3,126,063	3,126,063
FDAF DISLOCATED ASSET FUND II (CAYMAN) LIMITED	FMV	530,690	530,690
FDAF DISLOCATED ASSET FUND III(CAYMAN) LIMITED	FMV	1,328,289	1,328,289
FDAF DISLOCATED ASSET FUND IV (CAYMAN) LIMITED	FMV	2,441,616	2,441,616
FHLMC MULTICLASS MTG 5035 ZA	FMV	128,861	128,861
FHLMC MULTICLASS MTG 5352 KA	FMV	144,403	144,403
FHLMC MULTICLASS MTG 5441 JL	FMV	303,825	303,825
FHLMC POOL #RJ-1927	FMV	1,067,499	1,067,499
FNMA GTD REMIC P/T 13-20 YZ	FMV	173,119	173,119
FNMA GTD REMIC P/T 20-22 DY	FMV	252,308	252,308
FNMA GTD REMIC P/T 21-57 Y	FMV	209,618	209,618
FNMA GTD REMIC P/T 22-57 ZG	FMV	544,462	544,462
FNMA POOL #0CB8982	FMV	1,136,736	1,136,736
FNMA POOL #0FS7064	FMV	235,273	235,273
FORESITE CAPITAL FUND V LP	FMV	475,505	475,505
FORESITE CAPITAL FUND VI LP	FMV	457,488	457,488
FORESITE CAPITAL OPPORTUNITY FUND V, L.P.	FMV	116,948	116,948
FUNDSMITH EQUITY FUND LP CLASS	FMV	5,099,745	5,099,745
GMO RESOURCES FUND-III	FMV	2,541,421	2,541,421
GNMA GTD REMIC P/T 17-38 Z	FMV	579,299	579,299
GNMA GTD REMIC P/T 21-156 CZ	FMV	246,365	246,365
GNMA GTD REMIC P/T 22-127 QM	FMV	444,136	444,136
GNMA GTD REMIC P/T 22-139 ZE	FMV	114,677	114,677
GNMA GTD REMIC P/T 22-152 CN	FMV	410,983	410,983
GNMA GTD REMIC P/T 22-152 DN	FMV	515,642	515,642
GNMA GTD REMIC P/T 22-18 PZ	FMV	173,277	173,277
GNMA GTD REMIC P/T 23-106 LZ	FMV	279,836	279,836
GNMA GTD REMIC P/T 23-18 AZ	FMV	497,937	497,937
GNMA GTD REMIC P/T 23-56 KJ	FMV	191,132	191,132
GNMA GTD REMIC P/T 23-7 Z	FMV	436,848	436,848
GNMA GTD REMIC P/T 23-99 EL	FMV	343,320	343,320
GQG PARTNERS INTERNATIONAL	FMV	3,257,079	3,257,079
INDIA ACORN FUND (CAYMAN) LTD	FMV	4,699,665	4,699,665
INNOVATION ENDEAVORS IV LP	FMV	761,474	761,474
MAINGATE MLP FUND-I	FMV	6,895,234	6,895,234
MAREN CAPITAL	FMV	8,596,172	8,596,172

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MGG SF EVERGREEN UNLEVERED	FMV	4,139,245	4,139,245
NOVALIS LIFESCIENCES INVESTMENTS II, LP	FMV	990,799	990,799
NOVALPINA CAPITAL PTNRS I SCSP	FMV	819,933	819,933
ORCHARD LIQUID CREDIT FUND	FMV	1,718,621	1,718,621
OVERLOOK PARTNERS FD LP	FMV	3,430,340	3,430,340
OWLS NEST PARTNERS	FMV	2,685,259	2,685,259
THIRD POINT OFFSHORE FUND LTD	FMV	3,148,683	3,148,683
THIRD POINT STRUCTURED CREDIT OPPORTUNITIES OFFSHORE FUND LP	FMV	4,891,176	4,891,176
VANGUARD ST TRSY INDX	FMV	21,246,086	21,246,086
WARBURG PINCUS GLOBAL GROWTH	FMV	2,333,948	2,333,948
WARBURG PINCUS GLOBAL GROWTH 14	FMV	1,203,951	1,203,951
WARBURG PINCUS PE XII LP	FMV	1,821,246	1,821,246
WCM FOCUSED INTERNATIONAL OPPORTUNITIES FUND LP	FMV	1,238,209	1,238,209
WF ASIAN SMALLER COMPANIES	FMV	3,182,701	3,182,701
YORK CREDIT OPPORTUNITIES	FMV	49,220	49,220

TY 2024 IRS 990 e-File Render

Name: RITA ALLEN FOUNDATION INC

EIN: 13-6116429

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
GENERAL AND ADMINISTRATIVE LEGAL COUNSEL	6,833	0		6,833

TY 2024 IRS 990 e-File Render

Name: RITA ALLEN FOUNDATION INC

EIN: 13-6116429

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
SECURITY DEPOSIT	6,053	6,053	6,053

TY 2024 IRS 990 e-File Render

Name: RITA ALLEN FOUNDATION INC

EIN: 13-6116429

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	13,674	0		13,674
OFFICE EXPENSES	6,005	0		6,005
MEMBERSHIPS AND DUES	30,824	0		30,824
ANNUAL REPORT FILING	1,533	0		1,533
SCIENTIFIC ADVISORY HONORARIA	42,000	0		42,000
PAYROLL SERVICE	4,379	0		4,379
GRANT SOFTWARE & WEB SERVICES	50,002	0		50,002
OFFICE FURNITURE AND EQUIPMENT	15,529	0		15,529
PROGRAM/COMMUNICATIONS EXPENSE	116,298	0		116,298
SYMPOSIUMS AND WORKSHOP	110,729	0		110,729
OTHER INVESTMENT EXPENSES THRU SCHEDULE K-1S	0	423,768		0
DIRECT CHARITABLE ACTIVITES	338,388	0		338,388
BANK FEES	1,763	1,763		0
STAFF DEVELOPMENT	308	0		308

TY 2024 IRS 990 e-File Render

Name: RITA ALLEN FOUNDATION INC

EIN: 13-6116429

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER PARTNERSHIP INCOME	321,132	0	321,132
CLASS ACTION SETTLEMENT	1,535	1,535	1,535
OTHER MISCELLANEOUS INCOME	2,849	2,849	2,849
OTHER INVESTMENT INCOME THROUGH SCHEDULE K-1S	0	285,204	0
GRANT REFUNDS	692		692

TY 2024 IRS 990 e-File Render

Name: RITA ALLEN FOUNDATION INC

EIN: 13-6116429

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	4,999,741

TY 2024 IRS 990 e-File Render

Name: RITA ALLEN FOUNDATION INC
EIN: 13-6116429

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT CUSTODIAL, ADVISORY AND MANAGEMENT FEES	1,154,928	1,211,606		0
OTHER PROFESSIONAL FEES	3,494	0		3,494
IT SERVICES	13,200	0		13,200
HR AND STAFFING CONSULTANTS	97,806	0		97,806

TY 2024 IRS 990 e-File Render

Name: RITA ALLEN FOUNDATION INC

EIN: 13-6116429

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	245,000	0		0
FOREIGN TAXES WITHHELD THROUGH SCHEDULE K-1S	0	39,943		0