Form **990-PF**

Department of the Treasury
Internal Revenue Service

# Return of Private Foundation

**or Section 4947(a)(1) Trust Treated as Private Foundation**

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047

**2024**

**Open to Public Inspection**

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

Name of foundation
THE LASZLO N TAUBER FAMILY FOUNDATION INC

**A Employer identification number**
30-0208793

Number and street (or P.O. box number if mail is not delivered to street address)
2440 RESEARCH BLVD 440

Room/suite

**B** Telephone number (see instructions)
(301) 231-8334

City or town, state or province, country, and ZIP or foreign postal code
ROCKVILLE, MD 20850

**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)* ▶$ 40,859,831

**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 | 180,310 | 180,310 | | |
| | 4 | Dividends and interest from securities | 432,029 | 426,595 | | |
| | 5a | Gross rents | | | | |
| | b | Net rental income or (loss) | | | | |
| | 6a | Net gain or (loss) from sale of assets not on line 10 | 820,588 | | | |
| | b | Gross sales price for all assets on line 6a 7,728,137 | | | | |
| | 7 | Capital gain net income (from Part IV, line 2) | | 932,305 | | |
| | 8 | Net short-term capital gain | | | | |
| | 9 | Income modifications | | | | |
| | 10a | Gross sales less returns and allowances | | | | |
| | b | Less: Cost of goods sold | | | | |
| | c | Gross profit or (loss) (attach schedule) | | | | |
| | 11 | Other income (attach schedule) | 1,578,966 | 1,452,529 | | |
| | 12 | **Total.** Add lines 1 through 11 | 3,011,893 | 2,991,739 | | |
| Operating and Administrative Expenses | 13 | Compensation of officers, directors, trustees, etc. | 420,721 | 150,000 | | 270,721 |
| | 14 | Other employee salaries and wages | | | | |
| | 15 | Pension plans, employee benefits | | | | |
| | 16a | Legal fees (attach schedule) | | | | |
| | b | Accounting fees (attach schedule) | 44,945 | 24,967 | | 17,978 |
| | c | Other professional fees (attach schedule) | 493,613 | 411,428 | | 82,185 |
| | 17 | Interest | | | | |
| | 18 | Taxes (attach schedule) (see instructions) | 46,708 | 2,008 | | 0 |
| | 19 | Depreciation (attach schedule) and depletion | 4,772 | 0 | | |
| | 20 | Occupancy | 69,585 | 41,751 | | 27,834 |
| | 21 | Travel, conferences, and meetings | 6,653 | 0 | | 6,653 |
| | 22 | Printing and publications | | | | |
| | 23 | Other expenses (attach schedule) | 31,988 | 5,570 | | 26,418 |
| | 24 | **Total operating and administrative expenses.** Add lines 13 through 23 | 1,118,985 | 635,724 | | 431,789 |
| | 25 | Contributions, gifts, grants paid | 1,285,081 | | | 1,285,081 |
| | 26 | **Total expenses and disbursements.** Add lines 24 and 25 | 2,404,066 | 635,724 | | 1,716,870 |
| | 27 | Subtract line 26 from line 12: | | | | |
| | a | **Excess of revenue over expenses and disbursements** | 607,827 | | | |
| | b | **Net investment income** (if negative, enter -0-) | | 2,356,015 | | |
| | 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 | | | |
| | 2 | Savings and temporary cash investments | 2,162,794 | 1,703,244 | 1,703,244 |
| | 3 | Accounts receivable ▶ 10,148 | | | |
| | | Less: allowance for doubtful accounts ▶ | | 10,148 | 10,148 |
| | 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 | | 6,446 | 6,446 |
| | 10a | Investments—U.S. and state government obligations (attach schedule) | 973,629 | 1,298,868 | 1,298,868 |
| | b | Investments—corporate stock (attach schedule) | 12,442,760 | 14,647,370 | 14,647,370 |
| | c | Investments—corporate bonds (attach schedule) | 1,501,399 | 1,418,469 | 1,418,469 |
| | 11 | Investments—land, buildings, and equipment: basis ▶ | | | |
| | | Less: accumulated depreciation (attach schedule) ▶ | | | |
| | 12 | Investments—mortgage loans | | | |
| | 13 | Investments—other (attach schedule) | 22,327,552 | 21,775,286 | 21,775,286 |
| | 14 | Land, buildings, and equipment: basis ▶ | | | |
| | | Less: accumulated depreciation (attach schedule) ▶ | | | |
| | 15 | Other assets (describe ▶ ) | | | |
| | 16 | **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I) | 39,408,134 | 40,859,831 | 40,859,831 |
| 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 | | | |
| | 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 | 0 | 0 | |
| | 27 | Paid-in or capital surplus, or land, bldg., and equipment fund | 0 | 0 | |
| | 28 | Retained earnings, accumulated income, endowment, or other funds | 39,408,134 | 40,859,831 | |
| | 29 | **Total net assets or fund balances** (see instructions) | 39,408,134 | 40,859,831 | |
| | 30 | **Total liabilities and net assets/fund balances** (see instructions) | 39,408,134 | 40,859,831 | |

**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 | 39,408,134 |
| 2 | Enter amount from Part I, line 27a | 2 | 607,827 |
| 3 | Other increases not included in line 2 (itemize) ▶ | 3 | 843,870 |
| 4 | Add lines 1, 2, and 3 | 4 | 40,859,831 |
| 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 | 40,859,831 |

## Part IV Capital Gains and Losses for Tax on Investment Income

| | (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | (b) How acquired P—Purchase D—Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|---|---|---|---|---|
| 1 a | PUBLICLY TRADED SECURITIES | | | |
| b | ATLAS POINT DURABLE GROWTH | P | | 2024-12-31 |
| c | CAPITAL GAINS DIVIDENDS | P | | |
| d | | | | |
| e | | | | |

| | (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) |
|---|---|---|---|---|
| a | 7,709,051 | | 6,827,925 | 881,126 |
| b | | | | 32,093 |
| c | 19,086 | | | 19,086 |
| d | | | | |
| e | | | | |

| | 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 | | | | 881,126 |
| b | | | | 32,093 |
| c | | | | 19,086 |
| d | | | | |
| e | | | | |

| | | | |
|---|---|---|---|
| 2 | Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } | 2 | 932,305 |
| 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) | | | 1 | 32,749 |
| 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 | 32,749 |
| 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 | 32,749 |
| 6 | Credits/Payments: | | | | |
| a | 2024 estimated tax payments and 2023 overpayment credited to 2024 | 6a | 25,970 | | |
| b | Exempt foreign organizations—tax withheld at source | 6b | 0 | | |
| c | Tax paid with application for extension of time to file (Form 8868) | 6c | 30,000 | | |
| d | Backup withholding erroneously withheld | 6d | 0 | | |
| 7 | Total credits and payments. Add lines 6a through 6d | | | 7 | 55,970 |
| 8 | Enter any **penalty** for underpayment of estimated tax. Check here ☑ if Form 2220 is attached. | | | 8 | 454 |
| 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 | 22,767 |
| 11 | Enter the amount of line 10 to be: **Credited to 2025 estimated tax** ▶ 22,767 | **Refunded** ▶ | | 11 | 0 |

## Part VI-A Statements Regarding Activities

| | | | Yes | No |
|---|---|---|---|---|
| 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? | 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. | 1b | | No |
| | *If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.* | | | |
| c | Did the foundation file **Form 1120-POL** for this year? | 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? *If "Yes," attach a detailed description of the activities.* | 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? *If "Yes," attach a conformed copy of the changes* | 3 | | No |
| 4a | Did the foundation have unrelated business gross income of $1,000 or more during the year? | 4a | Yes | |
| b | If "Yes," has it filed a tax return on **Form 990-T** for this year? | 4b | Yes | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.* | 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? *If "Yes," complete Part II, col. (c), and Part XIV.* | 7 | Yes | |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MD | | | |
| b | If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation* | 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. If "Yes," complete Part XIII | 9 | | No |
| 10 | Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.* | 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)? If "Yes," attach schedule. See instructions | 11 | Yes | |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions | 12 | | No |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ WWW.TAUBERFOUNDATION.ORG | 13 | Yes | |
| 14 | The books are in care of ▶ SHARI HALL Telephone no. ▶ (301) 231-8334 Located at ▶ 2440 RESEARCH BLVD SUITE 440 ROCKVILLE MD ZIP+4 ▶ 20850 | | | |
| 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. If "Yes", enter the name of the foreign country ▶ IS | 16 | Yes | No |

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

| | | | Yes | No |
|---|---|---|---|---|
| | **File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.** | | | |
| **1a** | During the year did the foundation (either directly or indirectly): | | | |
| | **(1)** Engage in the sale or exchange, or leasing of property with a disqualified person? | 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? | 2a | | No |
| | If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____ | | | |
| **b** | Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.) | 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 | Yes | |
| **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 | | No |
| **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)*

| | | | Yes | No |
|---|---|---|---|---|
| **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))? | 5a(1) | | No |
| | **(2)** Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? | 5a(2) | | No |
| | **(3)** Provide a grant to an individual for travel, study, or other similar purposes? | 5a(3) | | No |
| | **(4)** Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions | 5a(4) | | No |
| | **(5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? | 5a(5) | | No |
| **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 | 5b | | |
| **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? | 5d | | |
| | *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? | 6a | | No |
| **b** | Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | | No |
| | *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? | 7a | | No |
| **b** | If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction? | 7b | | |
| **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? | 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 |
|---|---|---|---|---|
| INGRID D TAUBER<br>2440 RESEARCH BLVD SUITE 440<br>ROCKVILLE, MD 20850 | PRESIDENT/DIRECTOR<br>10.00 | 125,000 | 0 | 0 |
| ALFRED I TAUBER<br>2440 RESEARCH BLVD SUITE 440<br>ROCKVILLE, MD 20850 | VP/TREASURER (AS OF 3/2024)<br>10.00 | 125,000 | 0 | 0 |
| JAY H GROSSMAN<br>2440 RESEARCH BLVD SUITE 440<br>ROCKVILLE, MD 20850 | TREASURER (UNTIL 2/2024)<br>15.20 | 0 | 0 | 0 |
| SHARI HALL<br>2440 RESEARCH BLVD SUITE 440<br>ROCKVILLE, MD 20850 | SECRETARY (AS OF 3/2024)<br>25.20 | 0 | 0 | 0 |
| SYLVIA TESSLER-LOZOWICK<br>2440 RESEARCH BLVD SUITE 440<br>ROCKVILLE, MD 20850 | EXEC. DIRECTOR (UNTIL 12/2024)<br>40.00 | 170,721 | 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 |
|---|---|---|---|---|
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

**Total** number of other employees paid over $50,000 ▶ 0

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

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

| **(a)** Name and address of each person paid more than $50,000 | **(b)** Type of service | **(c)** Compensation |
|---|---|---|
| TAUBER FAMILY OFFICE LLC<br>2440 RESEARCH BLVD SUITE 440<br>ROCKVILLE,MD 20850 | ADMINISTRATIVE SUPPORT SERVICES | 379,887 |
| | | |
| | | |
| | | |
| | | |

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

0

## Part VIII- Summary of Direct Charitable Activities

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. | Expenses |
|---|---|
| 1 | |
| 2 | |
| 3 | |
| 4 | |

## Part VIII- Summary of Program-Related Investments (see instructions)

| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. | Amount |
|---|---|
| 1 | |
| 2 | |
| All other program-related investments. See instructions. 3 | |
| **Total.** Add lines 1 through 3 . . . . . ▶ | 0 |

## Part IX Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

| | | | | | |
|---|---|---|---|---|---|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | | | |
| a | Average monthly fair market value of securities | | | 1a | 18,364,839 |
| b | Average of monthly cash balances | | | 1b | 2,108,653 |
| c | Fair market value of all other assets (see instructions) | | | 1c | 19,771,602 |
| d | **Total** (add lines 1a, b, and c) | | | 1d | 40,245,094 |
| 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 | 40,245,094 |
| 4 | Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) | | | 4 | 603,676 |
| 5 | **Net value of noncharitable-use assets.** Subtract line 4 from line 3 | | | 5 | 39,641,418 |
| 6 | **Minimum investment return.** Enter 5% (0.05) of line 5 | | | 6 | 1,982,071 |

## 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 | 1,982,071 |
| 2a | Tax on investment income for 2024 from Part V, line 5 | 2a | 32,749 | | |
| b | Income tax for 2024. (This does not include the tax from Part V.) | 2b | | | |
| c | Add lines 2a and 2b | | | 2c | 32,749 |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | | | 3 | 1,949,322 |
| 4 | Recoveries of amounts treated as qualifying distributions | | | 4 | 0 |
| 5 | Add lines 3 and 4 | | | 5 | 1,949,322 |
| 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 | 1,949,322 |

## 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 | 1,716,870 |
| 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 | 1,716,870 |

**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 | | | | 1,949,322 |
| **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. . . . . 1,732,617 | | | | |
| **b** From 2020. . . . . 1,601,264 | | | | |
| **c** From 2021. . . . . 4,371,531 | | | | |
| **d** From 2022. . . . . 149,958 | | | | |
| **e** From 2023. . . . . | | | | |
| **f** **Total** of lines 3a through e . . . . . | 7,855,370 | | | |
| **4** Qualifying distributions for 2024 from Part XI, line 4: ▶ $ 1,716,870 | | | | |
| **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 . . . . . | | | | 1,716,870 |
| **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).)* | 232,452 | | | 232,452 |
| **6** **Enter the net total of each column as indicated below:** | | | | |
| **a** Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 | 7,622,918 | | | |
| **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) . . . | 1,500,165 | | | |
| **9** **Excess distributions carryover to 2025.** Subtract lines 7 and 8 from line 6a . . . . . | 6,122,753 | | | |
| **10** Analysis of line 9: | | | | |
| **a** Excess from 2020 . . . . 1,601,264 | | | | |
| **b** Excess from 2021 . . . . 4,371,531 | | | | |
| **c** Excess from 2022. . . . 149,958 | | | | |
| **d** Excess from 2023 . . . . | | | | |
| **e** Excess from 2024 . . . . | | | | |

## Part XIII Private Operating Foundations (see instructions and Part VI-A, question 9)

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 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)

| | Tax year | Prior 3 years | | | (e) Total |
|---|---|---|---|---|---|
| | **(a)** 2024 | **(b)** 2023 | **(c)** 2022 | **(d)** 2021 | |
| **2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed . . . . . | | | | | |
| **b** 85% (0.85) of line 2a . . . . . | | | | | |
| **c** Qualifying distributions from Part XI, line 4 for each year listed . . . . . | | | | | |
| **d** Amounts included in line 2c not used directly for active conduct of exempt activities . . . . . | | | | | |
| **e** Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . | | | | | |
| **3** Complete 3a, b, or c for the alternative test relied upon: | | | | | |
| **a** "Assets" alternative test—enter: | | | | | |
| **(1)** Value of all assets . . . . . | | | | | |
| **(2)** Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | |
| **b** "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed . . | | | | | |
| **c** "Support" alternative test—enter: | | | | | |
| **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . | | | | | |
| **(2)** Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . | | | | | |
| **(3)** Largest amount of support from an exempt organization | | | | | |
| **(4)** Gross investment income | | | | | |

## Part Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see instructions.)

**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

**a** The name, address, and telephone number or email address of the person to whom applications should be addressed:

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

**c** Any submission deadlines:

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

**Part Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient<br>Name and address (home or business) | 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 |
|---|---|---|---|---|
| **a** *Paid during the year* | | | | |
| ALZHEIMER'S ASSOCIATION<br><br>225 NORTH MICHIGAN AVE 1700<br>CHICAGO,IL 60601 | | P C | IN MEMORY OF LILLIAN MUSSA | 10,000 |
| ALZHEIMER'S FOUNDATION OF AMERICA<br><br>322 8TH AVE FL 16<br>NEW YORK,NY 100016769 | | P C | IN MEMORY OF LILLIAN MUSSA | 10,000 |
| AMERICA GIVES INC<br><br>1732 1ST AVE 27081<br>NEW YORK,NY 10128 | | P C | ECOOCEAN FOUNDATION | 10,000 |
| AMERICAN FRIENDS OF ALYN HOSPITAL<br><br>122 E 42ND ST STE 1519<br>NEW YORK,NY 10168 | | P C | ELI KAZHDAN | 1,000 |
| AMERICAN FRIENDS OF ALYN HOSPITAL<br><br>122 E 42ND ST STE 1519<br>NEW YORK,NY 10168 | | P C | MISHA KAZHDAN | 1,000 |
| AMERICAN FRIENDS OF ITIM<br><br>247 WEST 36TH STREET 5TH FLOOR<br>NEW YORK,NY 10018 | | P C | GENERAL CHARITABLE OPERATIONS | 10,000 |
| AMERICAN FRIENDS OF KISHORIT<br><br>PO BOX 370362<br>WEST HARTFORD,CT 06137 | | P C | 2025 BUDGET YEAR | 70,000 |
| AMERICAN FRIENDS OF KISHORIT<br><br>PO BOX 370362<br>WEST HARTFORD,CT 06137 | | P C | GENERAL CHARITABLE OPERATIONS | 18,000 |
| AMERICAN FRIENDS OF MEIR PANIM<br><br>88 WALTON STREET SUITE B1<br>BROOKLYN,NY 11206 | | P C | FEEDING KIDS IN ISRAEL | 5,000 |
| AMERICAN FRIENDS OF THE NATIONAL INSITUTE FOR PSYCHOBIOLOGY IN ISRAEL<br><br>5825 S DORCHESTER AVE APT 9W<br>CHICAGO,IL 60637 | | P C | DYLAN TAUBER ANXIETY AND OCD RESEARCH GRANT | 20,000 |
| AMERICAN SOCIETY FOR THE UNIVERSITY OF HAIFA<br><br>80 BROAD STREET SUITE 2102<br>NEW YORK,NY 10004 | | P C | INTERDISIPLINARY CLINICAL CENTER (COVID-19) | 18,000 |
| AUSSIE RESCUE OF THE MID-ATLANTIC<br><br>2600 DEWITT AVE<br>ALEXANDRIA,VA 22301 | | P C | GENERAL CHARITABLE OPERATIONS | 1,760 |
| BIG BROTHERS AND BIG SISTERS OF PUGENT SOUND<br><br>1600 S GRAHAM ST<br>SEATTLE,WA 98108 | | P C | IN MEMORY OF LILLIAN MUSSA | 10,000 |
| BREAST CANCER PREVENTION PARTNERS<br><br>1388 SUTTER STREET SUITE 400<br>SAN FRANCISCO,CA 94109 | | P C | SCIENCE PROGRAM | 50,000 |

| | | | | |
|---|---|---|---|---|
| BRIGHAM AND WOMEN'S HOSPITAL<br><br>75 FRAMCOS STREET<br>BOSTON,MA 02115 | | PC | GENERAL CHARITABLE OPERATIONS | 25,000 |
| CHABAD HOUSE OF GREATER BOSTON<br><br>491 COMMONWEALTH AVENUE<br>BOSTON,MA 02215 | | PC | GENERAL CHARITABLE OPERATIONS | 10,000 |
| CHABAD OF NASHOBA VALLEY<br><br>26 TADMUCK ROAD<br>WESTFORD,MA 01886 | | PC | GENERAL CHARITABLE OPERATIONS | 25,000 |
| CHILDREN'S INN AT NIH<br><br>7 WEST DROVE<br>BETHESDA,MD 20814 | | PC | GENERAL CHARITABLE OPERATIONS | 3,000 |
| CHILDREN'S INN AT NIH<br><br>7 WEST DROVE<br>BETHESDA,MD 20814 | | PC | STOCK THE PANTRY | 5,000 |
| CONGREGATION BETH ISRAEL<br><br>1630 BANCROFT WAY<br>BERKELEY,CA 94703 | | PC | RABBI'S DISCRETIONARY FUND | 10,000 |
| CONGREGATION EMANU-EL<br><br>2 LAKE STREET<br>SAN FRANCISCO,CA 94118 | | PC | CANTOR CONCERT SERIES | 90,000 |
| CONGREGATION EMANU-EL<br><br>2 LAKE STREET<br>SAN FRANCISCO,CA 94118 | | PC | ADDITIONAL GRANT | 25,000 |
| CONGREGATION EMANU-EL<br><br>2 LAKE STREET<br>SAN FRANCISCO,CA 94118 | | PC | CAPITAL CAMPAIGN | 50,000 |
| CONGREGATION RODEF SHOLOM<br><br>170 N SAN PEDRO ROAD<br>SAN RAFAEL,CA 94903 | | PC | OUTDOOR TERRACE LIVING ROOM | 75,000 |
| CONGREGATION RODEF SHOLOM<br><br>170 N SAN PEDRO ROAD<br>SAN RAFAEL,CA 94903 | | PC | GENERAL CHARITABLE OPERATIONS | 98,000 |
| FARKAS CENTER FOR THE STUDY OF THE HOLOCAUST IN CATHOLIC SCHOOLS<br><br>701 36TH AVE<br>SAN FRANCISCO,CA 94121 | | PC | GENERAL CHARITABLE OPERATIONS | 10,000 |
| GUSH ETZION FOUNDATION<br><br>PO BOX 1030<br>MANCHESTER,NH 03105 | | PC | GENERAL CHARITABLE OPERATIONS | 1,000 |
| INTERNATIONAL ASSOCIATION FOR NEAR DEATH STUDIES<br><br>2741 CAMPUS WALK AVE BLDG 500<br>DURHAM,NC 27705 | | PC | IANDS ISRAEL BRANCH | 5,000 |
| J JEWISH NEWS OF NORTHERN CALIFORNIA<br><br>225 BUSH STREET SUITE 480<br>SAN FRANCISCO,CA 94104 | | PC | GENERAL CHARITABLE OPERATIONS | 20,000 |
| JEWISH COMMUNITY FEDERATION OF SAN FRANCISCO<br><br>121 STEUART STREET<br>SAN FRANCISCO,CA 94105 | | PC | FBT AIT FUND FBO AVALOCH | 150,000 |
| JEWISH COMMUNITY FEDERATION OF SAN FRANCISCO | | PC | END OF YEAR GRANT | 16,139 |

| | | | | |
|---|---|---|---|---|
| 121 STEUART STREET<br>SAN FRANCISCO,CA 94105 | | | | |
| JEWISH FEDERATION OF NEW HAMPSHIRE<br><br>273 SOUTH RIVER ROAD 5<br>BEDFORD,NH 03110 | | PC | GENERAL CHARITABLE OPERATIONS | 1,800 |
| JEWISH FEDERATION OF NORTH AMERICA<br><br>25 BROADWAY SUITE 1700<br>NEW YORK,NY 100041010 | | PC | JERUSALEM MUSIC CENTER | 10,000 |
| JEWISH NATIONAL FUND<br><br>42 E 69TH ST<br>NEW YORK,NY 10021 | | PC | ISRAEL-ASIA CENTER | 5,000 |
| JEWISH SOCIAL SERVICES AGENCY<br><br>200 WOOD HILL ROAD<br>ROCKVILLE,MD 20850 | | PC | GENERAL CHARITABLE OPERATIONS | 2,500 |
| MILTON GOTTESMAN JEWISH DAY SCHOOL<br><br>6045 16TH STREET NW<br>WASHINGTON,DC 20011 | | PC | SCHOOL SECURITY | 10,000 |
| MONTGOMERY COUNTY HUMANE SOCIETY<br><br>601 S STONESTREET AVE<br>ROCKVILLE,MD 20852 | | PC | IN HONOR OF FORREST | 2,500 |
| NEW ISRAEL FUND<br><br>6 EAST 39TH STREET SUITE 301<br>NEW YORK,NY 10016 | | PC | AMUTAH MOSHE HESS & HAMOKED GENERAL FUND | 336,803 |
| PAN MASSACHUSETS CHALLENGE<br><br>77 FOURTH AVE<br>NEEDHAM,MA 02494 | | PC | GENERAL CHARITABLE OPERATIONS | 1,000 |
| PEF ISRAEL ENDOWMENT FUNDS INC<br><br>630 THIRD AVENUE15TH FLOOR<br>NEW YORK,NY 10017 | | PC | DELPHIS | 5,000 |
| ST IGNATIUS PREPATORY<br><br>2001 37TH AVENUE<br>SAN FRANCISCO,CA 94116 | | PC | GENERAL CHARITABLE OPERATIONS | 5,000 |
| STEPPING STONES SHELTER INC<br><br>PO BOX 712<br>ROCKVILLE,MD 208480712 | | PC | GENERAL CHARITABLE OPERATIONS | 2,500 |
| TEMPLE ISRAEL<br><br>66 SALMON STREET<br>MANCHESTER,NH 03104 | | PC | SECURITY | 1,800 |
| THE BREAST CANCER RESAERCH FOUNDATION<br><br>28 W 44TH ST SUITE 609<br>NEW YORK,NY 10036 | | PC | IN MEMORY OF LILLIAN MUSSA | 10,000 |
| TIDES CENTERSHALOM BAYIT<br><br>PO BOX 10102<br>OAKLAND,CA 94610 | | PC | GENERAL CHARITABLE OPERATIONS | 5,000 |
| TUFTS UNIVERSITY<br><br>AGIS 80 GEORGE STREET<br>MEDFORD,MA 02155 | | PC | 2025 BUDGET YEAR | 5,539 |
| TUFTS UNIVERSITY<br><br>AGIS 80 GEORGE STREET<br>MEDFORD,MA 02155 | | PC | 2024 BUDGET YEAR | 25,000 |
| | | PC | GENERAL CHARITABLE | 740 |

| | | | | |
|---|---|---|---|---|
| USA WARRIORS HOCKEY<br><br>1461 JORDAN AVENUE<br>CROFTON,MD 21114 | | | OPERATIONS | |
| USA WARRIORS HOCKEY<br><br>1461 JORDAN AVENUE<br>CROFTON,MD 21114 | | P C | GENERAL CHARITABLE OPERATIONS | 2,000 |
| **Total** . . . . . ▶ **3a** | | | | 1,285,081 |
| **b** *Approved for future payment* | | | | |
| **Total** . . . . . ▶ **3b** | | | | 0 |

## Part XV-A Analysis of Income-Producing Activities

| Enter gross amounts unless otherwise indicated. | 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 | |
| **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 | | | 14 | 180,310 | |
| **4** Dividends and interest from securities | | | 14 | 432,029 | |
| **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 | 820,588 | |
| **9** Net income or (loss) from special events: | | | | | |
| **10** Gross profit or (loss) from sales of inventory | | | | | |
| **11** Other revenue: | | | | | |
| **a** PARTNERSHIP ORD. INCOME | | | 14 | 1,578,966 | |
| **b** | | | | | |
| **c** | | | | | |
| **d** | | | | | |
| **e** | | | | | |
| **12** Subtotal. Add columns (b), (d), and (e) | | 0 | | 3,011,893 | 0 |

**13** **Total.** Add line 12, columns (b), (d), and (e) . . . . . **13** 3,011,893

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

## Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

| Line No. ▼ | Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.) |
|---|---|
| | |

## Part XVI Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

| | | Yes | No |
|---|---|---|---|
| **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 | 1a(1) | | No |
| **(2)** Other assets | 1a(2) | | No |
| **b** Other transactions: | | | |
| **(1)** Sales of assets to a noncharitable exempt organization | 1b(1) | | No |
| **(2)** Purchases of assets from a noncharitable exempt organization | 1b(2) | | No |
| **(3)** Rental of facilities, equipment, or other assets | 1b(3) | | No |
| **(4)** Reimbursement arrangements | 1b(4) | | No |
| **(5)** Loans or loan guarantees | 1b(5) | | No |
| **(6)** Performance of services or membership or fundraising solicitations | 1b(6) | | No |
| **c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | | No |

**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.

| **(a)** Line No. | **(b)** Amount involved | **(c)** Name of noncharitable exempt organization | **(d)** Description of transfers, transactions, and sharing arrangements |
|---|---|---|---|
| | | | |

**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.

Signature of officer or trustee | Date 2025-11-17 | 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 | Preparer's Signature | Date | Check if self-employed ☐ | PTIN |
|---|---|---|---|---|
| LACEY M QUATSOE | | 2025-11-17 | | P01300865 |

Firm's name ▶ CLIFTONLARSONALLEN LLP — Firm's EIN ▶ 41-0746749

Firm's address ▶ 420 SOUTH ORANGE AVENUE SUITE 900 ORLANDO, FL 32801 — Phone no. (407) 802-1200

## 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:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Category | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|---|---|---|---|---|
| ACCOUNTING | 44,945 | 24,967 | | 17,978 |

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

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Name of Bond | End of Year Book Value | End of Year Fair Market Value |
|---|---|---|
| UNITED RENTALS NORTH AM | 8,194 | 8,194 |
| HILLENBRAND INC | 8,741 | 8,741 |
| CITIGROUP INC | 9,687 | 9,687 |
| CNF INC DEBENTURES | 8,333 | 8,333 |
| ABBVIE INC | 8,890 | 8,890 |
| AT&T INC | 26,095 | 26,095 |
| YUMI BRANDS INC | 6,468 | 6,468 |
| ENCOMPASS HEALTH CORP | 8,533 | 8,533 |
| ENACT HOLDINGS INC | 8,153 | 8,153 |
| PILGRIM'S PRIDE CORP | 8,282 | 8,282 |
| CELANESE US HOLDINGS LLC | 8,302 | 8,302 |
| LAMAR MEDIA CORP | 8,440 | 8,440 |
| ASBURY AUTOMOTIVE GRP | 8,416 | 8,416 |
| ABBVIE INC | 8,997 | 8,997 |
| H.B. FULLER CO SR | 8,465 | 8,465 |
| ENCOMPASS HEALTH CORP | 8,684 | 8,684 |
| CCO HLDGS LLC/CAP CORP | 8,602 | 8,602 |
| MGM RESORTS INTL | 8,945 | 8,945 |
| ANHEUSER-BUSCH INBEV WOR | 16,874 | 16,874 |
| PNC FINANCIAL SERVICES FX/FLT SR UNSECURED | 16,226 | 16,226 |
| ABBVIE INC | 16,515 | 16,515 |
| CUSIP 91282CKA8 | 14,042 | 14,042 |
| AECOM | 6,932 | 6,932 |
| CITIGROUP INC | 23,946 | 23,946 |
| CVS HEALTH CORP | 17,256 | 17,256 |
| SM ENERGY CO | 8,989 | 8,989 |
| HILTON DOMESTIC OPERATIN | 8,633 | 8,633 |
| UNITEDHEALTH GRP INC | 13,930 | 13,930 |
| KINDER MORGAN INC | 13,952 | 13,952 |
| TRUIST FINANCIAL CORP | 14,124 | 14,124 |
| FORD MOTOR CO | 8,859 | 8,859 |
| BANK OF AMERICA CORP | 17,347 | 17,347 |
| US BANCORP | 17,141 | 17,141 |
| RANGE RESOURCES CORP | 8,971 | 8,971 |
| MOODY A1 , S8P A-CUSIP 06051GGA1 | 15,465 | 15,465 |
| GOLDMAN SACHS GRP INC | 16,764 | 16,764 |
| HOWMET AEROSPACE INC | 8,168 | 8,168 |
| SIX FLAGS ENTERTAINMENT | 7,915 | 7,915 |
| SHELL INTERNATIONAL FIN | 9,777 | 9,777 |
| PLAINS ALL AMERICAN PIPELINE LP / PAA FINANCE CORP 4.65% 15 OCT 2025 | 2,996 | 2,996 |
| SOUTHWESTERN ENERGY CO | 6,895 | 6,895 |
| SBA COMMUNICATIONS CORP | 7,660 | 7,660 |
| GOLDMAN SACHS GRP INC | 9,378 | 9,378 |
| JPMORGAN CHASE & CO VARIABLE 6.254% 23 OCT 2034 | 2,113 | 2,113 |
| CITIGROUP INC | 6,771 | 6,771 |
| YUM! BRANDS INC SR UNSECURED CALLABLE CPN 5.375% DUE 04/01/32 | 6,779 | 6,779 |
| ORACLE CORP 6.15% 09 NOV 2029 | 2,098 | 2,098 |
| SERVICE CORP INTL | 6,772 | 6,772 |
| OLIN CORP | 6,806 | 6,806 |
| CROWN AMERICAS | 6,812 | 6,812 |
| FIRSTENERGY CORP | 6,817 | 6,817 |
| CROWN AMER/CAP CORP V | 6,828 | 6,828 |
| SPIRIT AEROSYSTEMS INC | 6,831 | 6,831 |
| DCP MIDSTREAM OPERATING | 5,006 | 5,006 |
| L BRANDS INC | 6,892 | 6,892 |
| UNITED RENTALS NORTH AM | 6,802 | 6,802 |
| ALLY FINANCIAL INC 4.75% 09 JUN 2027 | 2,978 | 2,978 |
| SPRINT CORP | 8,177 | 8,177 |
| MACYS RETAIL HLDGS INO | 3,329 | 3,329 |
| BERKSHIRE HATHAWAY INC | 17,724 | 17,724 |
| CHARTER COMM OPT LLC/CAP | 7,387 | 7,387 |
| BANK OF AMERICA CORP VARIABLE 4.271% 23 JUL 2029 | 3,896 | 3,896 |
| LAMAR MEDIA CORP | 6,725 | 6,725 |
| STRYKER CORP 3.375% 01 NOV 2025 | 24,750 | 24,750 |
| VERIZON COMMUNICATIONS | 24,718 | 24,718 |
| CINTAS CORP NO 2 3.7% 01 APR 2027 | 24,504 | 24,504 |
| WESTERN DIGITAL CORP | 6,932 | 6,932 |
| PBF HOLDING CO | 4,795 | 4,795 |
| QVC INC | 4,315 | 4,315 |
| AT&T INC 2.75% 01 JUN 2031 | 2,609 | 2,609 |
| VITAL ENERGY INC | 6,327 | 6,327 |
| SEAGATE HDD CAYMAN | 6,896 | 6,896 |
| HEXCEL CORP | 1,955 | 1,955 |
| UNITEDHEALTH GRP INC | 9,868 | 9,868 |
| MORGAN STANLEY VARIABLE 4.889% 20 JUL 2033 | 2,905 | 2,905 |
| GEORGIA POWER CO | 17,861 | 17,861 |
| PENSKE AUTOMOTIVE GRP | 7,899 | 7,899 |
| CLEVELAND-CLIFFS INC | 6,960 | 6,960 |
| BALL CORP | 7,049 | 7,049 |
| WARNERMEDIA HOLDINGS INC | 7,931 | 7,931 |
| BALL CORP | 6,968 | 6,968 |
| TENET HEALTHCARE CORP | 6,945 | 6,945 |
| TENET HEALTHCARE | 7,985 | 7,985 |
| CUSIP 345370CX6 | 7,888 | 7,888 |
| AMERICAN AXLE & MFG INC | 7,911 | 7,911 |
| MURPHY OIL USA INC | 7,592 | 7,592 |
| HILTON WORLDWIDE FIN LLC | 15,782 | 15,782 |
| FIRSTENERGY CORP A | 7,947 | 7,947 |
| RHP HOTEL PPTY/RHP FINAN | 7,740 | 7,740 |
| TRI POINTE GROUP INC | 7,948 | 7,948 |
| CARPENTER TECHNOLOGY | 8,001 | 8,001 |
| MGM RESORTS INTL | 6,975 | 6,975 |
| CENTURY COMMUNITIES | 8,006 | 8,006 |
| HOWMET AEROSPACE INC | 7,318 | 7,318 |
| OLIN CORP | 7,510 | 7,510 |
| FLUOR CORP | 7,610 | 7,610 |
| VERIZON COMMUNICATIONS | 7,761 | 7,761 |
| NRG ENERGY INC | 6,975 | 6,975 |
| GILEAD SCIENCES INC ^ | 17,976 | 17,976 |
| ASBURY AUTOMATIVE GROUP | 7,667 | 7,667 |
| ROYAL CARIBBEAN CRUISES | 7,586 | 7,586 |
| CHEMOURS CO | 7,700 | 7,700 |
| STATE STREET CORP | 13,362 | 13,362 |
| PG&E CORP | 7,831 | 7,831 |
| GRIFFON CORPORATION | 7,845 | 7,845 |
| JPMORGAN CHASE & CO | 12,966 | 12,966 |
| M/I HOMES INC | 7,728 | 7,728 |
| BOYD GAMING CORP COMPANY | 7,733 | 7,733 |
| ONEMAIN FINANCE CORP | 7,423 | 7,423 |
| GOLDMAN SACHS GRP INC | 7,680 | 7,680 |
| MOODY A2, S&P A-CUSIP 025816DB2 | 7,861 | 7,861 |
| PATTERSON-UTI ENERGY INC | 7,652 | 7,652 |
| SPRINT CAPITAL CORP | 7,430 | 7,430 |
| ENTERPRISE PRODUCTS O ^ | 17,974 | 17,974 |
| UNITEDHEALTH GRP INC | 18,355 | 18,355 |
| JPMORGAN CHASE & CO | 13,623 | 13,623 |
| MOODY B3, S&P B CUSIP 893647BLO | 6,783 | 6,783 |
| SBA COMMUNICATIONS CORP | 7,221 | 7,221 |
| PENSKE AUTOMOTIVE GRP | 7,270 | 7,270 |
| CROWDSTRIKE HOLDINGS INC | 7,272 | 7,272 |
| COMMERCIAL METALS CO | 8,061 | 8,061 |
| FIDELITY TOTAL BOND ETF | 29,480 | 29,480 |
| L BRANDS INC | 8,131 | 8,131 |
| NEXTERA ENERGY CAPITA ^ | 11,020 | 11,020 |
| SM ENERGY CO | 6,993 | 6,993 |
| AMGEN INC | 12,086 | 12,086 |
| BROADCOM INC | 13,119 | 13,119 |
| CUSIP 185899AH4 | 13,214 | 13,214 |
| BANK OF AMERICA CORP | 13,231 | 13,231 |
| SEAGATE HDD CAYMAN | 7,676 | 7,676 |
| SHEA HOMES LP/FNDG CP | 6,706 | 6,706 |
| ENLINK MIDSTREAM PARTNER | 6,985 | 6,985 |
| AT&T INC | 12,531 | 12,531 |
| ORACLE CORP | 20,198 | 20,198 |
| CROWN CORK & SEAL CO | 7,182 | 7,182 |
| REGAL REXNORD CORP | 7,063 | 7,063 |
| GENERAL MOTORS FINL CO | 7,039 | 7,039 |
| CARPENTER TECHNOLOGY | 7,169 | 7,169 |
| HCA INC * | 7,001 | 7,001 |
| ADVANCE AUTO PARTS | 7,062 | 7,062 |
| FORD MOTOR CO | 8,078 | 8,078 |
| RADIAN GRP INC | 7,184 | 7,184 |
| CREDIT ACCEPTANC COMPANY | 7,000 | 7,000 |
| USA COM PART/USA COM FIN | 7,024 | 7,024 |
| ADVANCE AUTO PARTS | 7,048 | 7,048 |
| PACIFIC GAS & ELECTRIC | 7,080 | 7,080 |
| PILGRIM'S PRIDE CORP | 7,132 | 7,132 |
| DELTA AIR LINES INC | 7,151 | 7,151 |
| COMMERCIAL METALS CO | 7,068 | 7,068 |
| BALL CORP | 7,158 | 7,158 |

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

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Name of Stock | End of Year Book Value | End of Year Fair Market Value |
|---|---|---|
| EXTRA SPACE STORAGE INC | 3,291 | 3,291 |
| THERMO FISHER SCIENTIFIC INC | 17,688 | 17,688 |
| CORNING INC | 8,554 | 8,554 |
| PARSONS CORP DEL | 8,487 | 8,487 |
| GENERAL MOTORS CO | 4,102 | 4,102 |
| AMAZON INC | 160,374 | 160,374 |
| MONSTER BEVERAGE CORP | 55,503 | 55,503 |
| REVVITY INC | 7,924 | 7,924 |
| IDEX CORP | 7,325 | 7,325 |
| CELANESE CORPORATION SERIES A | 5,883 | 5,883 |
| PTC INC | 17,468 | 17,468 |
| ALPHABET INC VOTING | 97,111 | 97,111 |
| SNAP-ON INC | 5,771 | 5,771 |
| DOMINO'S PIZZA INC | 5,877 | 5,877 |
| EXXON MOBIL CORP | 66,371 | 66,371 |
| GE AEROSPACE NEW | 5,837 | 5,837 |
| CATERPILLAR INC | 5,804 | 5,804 |
| IDEXX LABORATORIES INC | 5,788 | 5,788 |
| GRAPHIC PACKAGING | 5,621 | 5,621 |
| WELLTOWER INC | 5,545 | 5,545 |
| AMERICAN TOWER CORP | 5,502 | 5,502 |
| COOPER COS INC | 5,422 | 5,422 |
| BERRY GLOBAL GROUP INC | 5,820 | 5,820 |
| BALL CORP | 7,057 | 7,057 |
| NVIDIA CORP | 232,993 | 232,993 |
| AON PLC | 58,184 | 58,184 |
| XCEL ENERGY INC | 16,340 | 16,340 |
| NORFOLK SOUTHERN CORP | 17,133 | 17,133 |
| NXP SEMICONDUCTORS NV | 23,903 | 23,903 |
| VANGUARD DIVDEND APPRECIATION ETF | 166,260 | 166,260 |
| OTIS WORLDWIDE CORP | 17,596 | 17,596 |
| MICROSOFT CORP | 113,384 | 113,384 |
| INTERCONTINENTAL EXCHANGE INC | 22,352 | 22,352 |
| VISA INC | 123,572 | 123,572 |
| TRACTOR SUPPLY CO | 12,469 | 12,469 |
| MONDAY COM LTD | 12,478 | 12,478 |
| AMAZON COM INC | 136,461 | 136,461 |
| TE CONNECTIVITY PLC | 12,724 | 12,724 |
| UNITED PARCEL SERVICE-B | 12,736 | 12,736 |
| ANALOG DEVICES INC | 12,748 | 12,748 |
| GLOBANT SA | 12,865 | 12,865 |
| GODADDY INC CLASS A | 14,407 | 14,407 |
| CENCORA INC | 21,794 | 21,794 |
| HILTON WORLDWIDE | 20,019 | 20,019 |
| CBRE GROUP INC CLASS A | 12,735 | 12,735 |
| CENCORA INC | 15,503 | 15,503 |
| GE HEALTHCARE TECHS | 24,313 | 24,313 |
| APPLE INC | 148,499 | 148,499 |
| VEEVA SYSTEMS INC | 13,666 | 13,666 |
| CONOCOPHILLIPS | 13,685 | 13,685 |
| TERADYNE INCORPORATED | 13,096 | 13,096 |
| BAKER HUGHES A GE CO | 13,003 | 13,003 |
| SCHWAB US DIVIDEND EQUITY ETF | 166,543 | 166,543 |
| BLUE OWL CAPITAL CORP | 1,151,311 | 1,151,311 |
| HOWMET AEROSPACE INC | 17,390 | 17,390 |
| NETFLIX INC | 147,959 | 147,959 |
| CISCO SYSTEMS INC | 17,405 | 17,405 |
| PNC FINANCIAL SERVICES | 17,549 | 17,549 |
| COINBASE GLOBAL INC | 23,837 | 23,837 |
| MORGAN STANLEY & CO | 99,822 | 99,822 |
| EATON CORP PLC | 47,126 | 47,126 |
| LIVE NATION ENTERTAINMENT INC | 4,533 | 4,533 |
| SBA COMMUNICATIONS CORP | 3,872 | 3,872 |
| ASML HOLDING NV | 4,852 | 4,852 |
| ABBVIE INC | 5,266 | 5,266 |
| ASTRAZENECA PLC | 24,504 | 24,504 |
| MONDAY.COM LTD | 8,711 | 8,711 |
| CME GROUP INC | 8,593 | 8,593 |
| IAC INC | 8,541 | 8,541 |
| META PLATFORMS INC | 4,099 | 4,099 |
| MONGODB INC | 3,958 | 3,958 |
| CAPITAL ONE FINANCIAL | 3,923 | 3,923 |
| MICROCHIP TECHNOLOGY INC | 1,893 | 1,893 |
| CONESTOGA SMALL CAP FUND | 102,692 | 102,692 |
| COOPER COS INC | 1,838 | 1,838 |
| PENTAIR PLC | 4,328 | 4,328 |
| ROYAL CARIBBEAN | 4,383 | 4,383 |
| COSTAR GROUP INC | 4,439 | 4,439 |
| TRADE DESK INC CLASS A | 27,032 | 27,032 |
| DATADOG INC CL A | 26,578 | 26,578 |
| VANGUARD VALUE ETF | 103,442 | 103,442 |
| JPMORGAN CHASE & CO | 103,075 | 103,075 |
| LINDE PLC NEW | 4,187 | 4,187 |
| YUM BRANDS INC | 23,344 | 23,344 |
| NIKE INC | 23,231 | 23,231 |
| BERKSHIRE HATHAWAY INC | 23,117 | 23,117 |
| AVALONBAY COMMUNITIES | 12,318 | 12,318 |
| TD SYNNEX CORP | 10,321 | 10,321 |
| ICON PLC | 17,615 | 17,615 |
| WOODWARD INC | 4,493 | 4,493 |
| MOTOROLA SOLUTIONS INC | 4,622 | 4,622 |
| WORKDAY INC | 21,158 | 21,158 |
| ANSYS INC | 4,723 | 4,723 |
| NOVARTIS AG | 21,019 | 21,019 |
| ROCKWELL AUTOMATION INC | 20,291 | 20,291 |
| PROCTER & GAMBLE CO | 20,286 | 20,286 |
| UNION PACIFIC CORP | 58,378 | 58,378 |
| BOEING CO | 107,616 | 107,616 |
| NU HOLDINGS LTD | 20,088 | 20,088 |
| RTX CORP | 20,020 | 20,020 |
| HOME DEPOT INC | 24,116 | 24,116 |
| WALT DISNEY CO/THE | 21,157 | 21,157 |
| STATE STR CORP | 23,949 | 23,949 |
| MCDONALD'S CORP | 18,263 | 18,263 |
| FIRST CITIZENS BKSHRS A | 16,904 | 16,904 |
| FAIR ISAAC INC | 35,837 | 35,837 |
| AMERIPRISE FINANCIAL INC | 23,427 | 23,427 |
| SAIA INC | 7,292 | 7,292 |
| PPL CORPORATION | 7,953 | 7,953 |
| FISERV INC | 24,856 | 24,856 |
| ILLUMINA INC | 24,989 | 24,989 |
| GILEAD SCIENCES INC | 10,716 | 10,716 |
| JABIL INC | 11,512 | 11,512 |
| MONDELEZ INTERNATIONAL INC | 11,349 | 11,349 |
| BATH & BODY WKS INC | 8,684 | 8,684 |
| GE HEALTHCARE TECHNOLOGIES INC | 3,049 | 3,049 |
| PAYPAL HOLDINGS INC | 24,752 | 24,752 |
| WESCO INTERNATIONAL INC | 4,886 | 4,886 |
| ZURN ELKAY WATER SOLUTIONS CORP | 4,849 | 4,849 |
| FLOOR & DECOR HOLDINGS INC | 4,786 | 4,786 |
| ARES MANAGEMENT CORP | 18,057 | 18,057 |
| PUBLIC STORAGE INC | 6,288 | 6,288 |
| CIBC ATLAS INTERNATIONAL GROWTH FUND | 235,817 | 235,817 |
| VERALTO CORPORATION | 9,574 | 9,574 |
| JAZZ PHARMACEUTICALS PLC | 9,359 | 9,359 |
| ROPER TECHNOLOGIES INC | 9,357 | 9,357 |
| MODERNA INC | 9,272 | 9,272 |
| GILEAD SCIENCES INC | 9,146 | 9,146 |
| DELL TECHNOLOGIES | 9,104 | 9,104 |
| CHIPOTLE MEXICAN GRILL INC | 9,045 | 9,045 |
| ALTRIA GROUP INC | 10,667 | 10,667 |
| COOPER COS INC | 4,963 | 4,963 |
| NORTHERN TRUST CORP | 616 | 616 |
| ICON PLC | 2,307 | 2,307 |
| LINCOLN ELECTRIC HLDGS | 14,248 | 14,248 |
| ACADEMY SPORTS & OUTDOORS INC | 3,337 | 3,337 |
| DEERE & CO | 10,593 | 10,593 |
| PINTEREST INC | 7,511 | 7,511 |
| VENTAS INC | 7,538 | 7,538 |
| SBA COMMUNICATIONS CORP | 6,318 | 6,318 |
| ALIGN TECHNOLOGY INC | 7,715 | 7,715 |
| TRANSUNION | 8,529 | 8,529 |
| UNITEDHEALTH GROUP | 11,635 | 11,635 |
| DAYFORCE INC | 14,237 | 14,237 |
| HERSHEY COMPANY | 9,483 | 9,483 |
| INTERNATIONAL PAPER CO | 14,315 | 14,315 |
| VICI PROPERTIES INC | 8,296 | 8,296 |
| MERCK & CO INC NEW | 8,190 | 8,190 |
| ZOETIS INC | 8,147 | 8,147 |
| MID-AMER APT COMMUNITIES | 8,038 | 8,038 |
| MONSTER BEVERAGE CORP | 7,569 | 7,569 |
| PUBLIC SVC ENTERPRISE | 6,421 | 6,421 |
| CYBERARK SOFTWARE LTD | 8,995 | 8,995 |
| CINCINNATI FINCL CORP | 11,209 | 11,209 |
| LAM RESH CORP NEW | 9,599 | 9,599 |
| CONSTELLATION ENERGY | 4,474 | 4,474 |
| HUMANA INC | 9,894 | 9,894 |
| CARTER HOLDINGS INC | 8,887 | 8,887 |
| REALTY INCOME CORP | 9,934 | 9,934 |
| EATON CORP PLC | 10,095 | 10,095 |
| COOPER COS INC | 2,757 | 2,757 |
| HP INC | 4,991 | 4,991 |
| KEURIG DR PEPPER INC | 22,034 | 22,034 |
| ON SEMI CONDUCTOR CORP | 8,890 | 8,890 |
| INTERCONTINENTAL EXCH | 2,830 | 2,830 |
| GILEAD SCIENCES INC | 1,105 | 1,105 |
| GILEAD SCIENCES INC | 4,527 | 4,527 |
| VERTIV HOLDINGS CO | 5,226 | 5,226 |
| UL SOLUTIONS INC CL A | 11,423 | 11,423 |
| APPLIED MATERIALS INC | 3,578 | 3,578 |
| CVS HEALTH | 2,963 | 2,963 |
| COOPER COS INC | 276 | 276 |
| GILEAD SCIENCES INC | 5,081 | 5,081 |
| NORTHERN TRUST CORP | 539 | 539 |
| DRAFTKINGS INC | 8,965 | 8,965 |
| TAKE-TWO INTERACTIVE | 9,020 | 9,020 |
| REGAL REXNORD CORP | 5,895 | 5,895 |
| OSHKOSH CORP | 3,803 | 3,803 |
| KINDER MORGAN INC DEL | 6,055 | 6,055 |
| INGERSOLL RAND INC | 9,860 | 9,860 |
| NATERA INC | 9,656 | 9,656 |
| POST HOLDINGS INC | 9,615 | 9,615 |
| ABBVIE INC | 708 | 708 |
| ALNYLAM PHARMACEUTICALS INC | 11,295 | 11,295 |
| WARNER BROS | 12,060 | 12,060 |
| CHEVRON CORP | 12,456 | 12,456 |
| BOOZ ALLEN HAMILTON | 12,098 | 12,098 |
| FORTUNE BRANDS | 12,163 | 12,163 |
| SILGAN HOLDINGS INC | 12,180 | 12,180 |
| MOBILEYE GLOBAL INC | 10,358 | 10,358 |
| EXPEDIA INC | 11,925 | 11,925 |
| UNITED RENTALS INC | 10,567 | 10,567 |
| MARTIN MARIETTA | 13,429 | 13,429 |
| HONEYWELL INTERNATIONAL INC | 14,457 | 14,457 |
| CHIPOTLE MEXICAN GRILL | 24,301 | 24,301 |
| SOUTHERN COMPANY | 46,511 | 46,511 |
| ALNYLAM PHARMACEUTICALS | 17,178 | 17,178 |
| SCHWAB CHARLES CORP NEW | 16,430 | 16,430 |
| US FOODS HOLDINGS CORP | 16,258 | 16,258 |
| ALIBABA GROUP HOLDING LTD | 18,060 | 18,060 |
| IQVIA HOLDINGS INC | 17,096 | 17,096 |
| VISTRA CORP | 13,373 | 13,373 |
| DISCOVER FINANCIAL | 16,977 | 16,977 |
| DOVER CORP COMMON | 15,946 | 15,946 |
| NEXTERA ENERGY INC | 15,987 | 15,987 |
| META PLATFORMS INC | 183,265 | 183,265 |
| HUBBELL INC | 16,755 | 16,755 |
| BERKLEY W R CORPORATION | 13,811 | 13,811 |
| GENUINE PARTS CO COM | 13,077 | 13,077 |
| DOCUSIGN INC | 13,311 | 13,311 |
| FIDELITY NATIONAL INFORMATION SERVICES INC | 15,912 | 15,912 |
| GLOBUS MEDICAL INC | 2,729 | 2,729 |
| CORPAY INC COM | 14,214 | 14,214 |
| AUTOMATIC DATA PROCESSING INC | 12,002 | 12,002 |
| CONSTELLATION BRANDS | 11,934 | 11,934 |
| CANADIAN NATURAL | 2,500 | 2,500 |
| GENERAL MILLS INC | 11,797 | 11,797 |
| L3HARRIS TECHNOLOGIES | 2,523 | 2,523 |
| COOPER COS INC | 3,590 | 3,590 |
| CURTISS-WRIGHT CORP | 3,904 | 3,904 |
| YUM BRANDS INC | 3,891 | 3,891 |
| ENTEGRIS INC | 8,717 | 8,717 |
| ELEVANCE HEALTH INC | 8,854 | 8,854 |
| NISOURCE INC | 11,212 | 11,212 |
| LAS VEGAS SANDS CORP | 15,665 | 15,665 |
| BIO-RAD LABORATORIES INC | 3,285 | 3,285 |
| CARLISLE COMPANIES INC | 14,385 | 14,385 |
| EOG RESOURCES INC | 5,884 | 5,884 |
| SAP SE-SPONSORED ADR | 4,924 | 4,924 |
| LAM RESH CORP NEW | 4,270 | 4,270 |
| BLACKSTONE GROUP INC | 5,000 | 5,000 |
| DIAMONDBACK ENERGY INC | 7,209 | 7,209 |
| RALPH LAUREN CORP | 13,397 | 13,397 |
| CROWDSTRIKE HOLDINGS INC | 6,159 | 6,159 |
| NVIDIA CORP | 2,686 | 2,686 |
| FMC CORP | 2,819 | 2,819 |
| THERMO FISHER SCIENTIFIC | 13,526 | 13,526 |
| MARTIN MARIETTA MATERIALS INC | 14,462 | 14,462 |
| MGIC INVESTMENT CORP WIS | 15,127 | 15,127 |
| SHARKNINJA INC | 11,586 | 11,586 |
| MARRIOTT INTERNATIONAL INC/MD | 11,715 | 11,715 |
| AMERICAN TOWER CORP | 11,738 | 11,738 |
| SYSCO CORPORATION | 11,775 | 11,775 |
| WEYERHAEUSER CO | 10,050 | 10,050 |
| GOLDMAN SACHS GROUP INC | 28,631 | 28,631 |
| PHILLIPS 66 | 8,887 | 8,887 |
| J B HUNT TRANSPORT | 30,889 | 30,889 |
| ABBOTT LABORATORIES | 50,447 | 50,447 |
| AMPHENOL CORP | 14,585 | 14,585 |
| MERCK & CO INC NEW | 26,131 | 26,131 |
| LIBERTY MEDIA CORP DEL | 37,064 | 37,064 |
| LEGEND BIOTECH CORP ADR | 12,886 | 12,886 |
| HUBSPOT INC | 20,903 | 20,903 |
| CSX CORP | 18,717 | 18,717 |
| SEMPRA ENERGY | 18,597 | 18,597 |
| EXXON MOBIL CORP | 24,203 | 24,203 |
| MACOM TECH SOLUTIONS | 18,577 | 18,577 |
| SEAFARER OVERSEAS GROWTH & INCOME FUND | 109,906 | 109,906 |
| DANAHER CORP | 21,807 | 21,807 |
| LULULEMON ATHLETICA INC | 21,797 | 21,797 |
| TAIWAN SEMICONDUCTOR | 20,934 | 20,934 |
| WALT DISNEY COMPANY | 20,934 | 20,934 |
| CISCO SYSTEMS INC | 24,272 | 24,272 |
| LPL FINANCIAL HOLDINGS | 17,305 | 17,305 |
| DANAHER CORP | 17,216 | 17,216 |
| TRADE DESK INC/THE | 17,630 | 17,630 |
| CME GROUP INC | 16,024 | 16,024 |
| ARCH CAP GROUP LTD | 16,992 | 16,992 |
| ISHARES CORE S&P 500 ETF | 306,114 | 306,114 |
| DATADOG INC | 19,004 | 19,004 |
| MASIMO CORP | 19,175 | 19,175 |
| PURE STORAGE INC CL A | 19,289 | 19,289 |
| ORACLE CORPORATION | 19,664 | 19,664 |
| HUBSPOT INC | 36,231 | 36,231 |
| KLA CORP | 50,410 | 50,410 |
| NOVO NORDISK A/S | 30,107 | 30,107 |
| BEST BUY CO INC | 11,154 | 11,154 |
| ZEBRA TECHNOLOGIES CORP | 14,676 | 14,676 |
| UNITEDHEALTH GROUP INC | 38,951 | 38,951 |
| ROSS STORES INC | 14,824 | 14,824 |
| HOME DEPOT INC/THE | 19,838 | 19,838 |
| ELEVANCE HEALTH INC | 24,347 | 24,347 |
| NORTHROP GRUMMAN CORP | 18,772 | 18,772 |
| BROADCOM INC | 82,535 | 82,535 |
| UNION PACIFIC CORP | 20,296 | 20,296 |
| CHEVRON CORPORATION | 25,926 | 25,926 |
| ANHEUSER BUSCH INBEV | 34,899 | 34,899 |
| MARRIOTT INTL INC NEW | 35,704 | 35,704 |
| TRANSDIGM GROUP INC | 44,355 | 44,355 |
| PEPSICO INCORPORATED | 53,525 | 53,525 |
| CONOCOPHILLIPS | 52,858 | 52,858 |
| BLACKROCK INC COM NEW | 30,753 | 30,753 |
| FIFTH THIRD BANCORP | 15,348 | 15,348 |
| CMS ENERGY CORP | 15,263 | 15,263 |
| CROWDSTRIKE HLDGS INC | 15,055 | 15,055 |
| REGIONS FINANCIAL CORP | 15,241 | 15,241 |
| WORKDAY INC | 15,224 | 15,224 |
| US BANCORP | 15,210 | 15,210 |
| GE VERNOVA LLC | 27,630 | 27,630 |
| STRYKER CORP | 15,122 | 15,122 |
| CHENIERE ENERGY INC NEW | 80,147 | 80,147 |
| HARTFORD INSURANCE GROUP | 14,550 | 14,550 |
| CHENIERE ENERGY INC | 6,446 | 6,446 |
| WELLS FARGO & CO NEW | 14,680 | 14,680 |
| CITIGROUP INC NEW | 30,901 | 30,901 |
| PROLOGIS INC | 46,085 | 46,085 |
| CIBC ATLAS INCOME OPPORTUNITIES FUND | 126,741 | 126,741 |
| TESLA INC | 259,265 | 259,265 |
| QUALCOMM INC | 6,452 | 6,452 |
| ADOBE SYSTEMS INC | 21,789 | 21,789 |
| NINTENDO LTD ADR | 15,757 | 15,757 |
| ULTA BEAUTY INC | 6,089 | 6,089 |
| PEPSICO INC | 16,118 | 16,118 |
| BLOCK, INC. | 27,197 | 27,197 |
| WALT DISNEY CO | 66,699 | 66,699 |
| THERMO FISHER SCIENTIFIC INC | 28,092 | 28,092 |
| KENVUE INC | 28,310 | 28,310 |
| AUTOZONE INC | 16,010 | 16,010 |
| JOHNSON & JOHNSON | 65,079 | 65,079 |
| EBAY INC | 20,567 | 20,567 |
| PNC FINANCIAL SERVICES GROUP INC/THE | 14,464 | 14,464 |
| M & T BANK CORP | 33,654 | 33,654 |
| AMERICAN EXPRESS COMPANY | 39,473 | 39,473 |
| WORKDAY INC | 53,928 | 53,928 |
| CHUBB LTD | 40,616 | 40,616 |
| AMETEK INC NEW | 40,919 | 40,919 |
| TRADEWEB MARKETS INC | 15,056 | 15,056 |
| ACCENTURE PLC IRELAND | 41,511 | 41,511 |
| NESTLE S A REG ADR | 32,517 | 32,517 |
| DRAFTKINGS INC NEW | 28,123 | 28,123 |
| AIR PRODUCTS & CHEMICALS | 32,484 | 32,484 |
| CROWN CASTLE INC | 41,840 | 41,840 |
| SEI INVESTMENTS CO | 31,012 | 31,012 |
| FIDELITY NATIONAL | 30,935 | 30,935 |
| META PLATFORMS INC | 15,809 | 15,809 |
| REGENERON PHARMACEUTICALS INC | 32,767 | 32,767 |
| QUEST DIAGNOSTICS INC | 15,086 | 15,086 |
| DIAGEO PLC | 38,902 | 38,902 |
| WALMART INC | 41,922 | 41,922 |
| WASTE CONNECTIONS INC | 19,732 | 19,732 |
| LINDE PLC | 18,003 | 18,003 |
| ORACLE CORP | 117,981 | 117,981 |
| TELEDYNE TECHNOLOGIES IN | 16,709 | 16,709 |
| CADENCE DESIGN SYSTEMS INC | 16,225 | 16,225 |
| ROCHE HOLDINGS | 16,708 | 16,708 |
| MCDONALDS CORP | 16,524 | 16,524 |
| SALESFORCE INC | 37,111 | 37,111 |
| AUTOZONE INC | 16,010 | 16,010 |
| SPDR DOW JONES INDUSTRIAL AVRG ETF | 223,388 | 223,388 |
| DARDEN RESTAURANTS | 16,429 | 16,429 |
| ACUITY INC | 16,067 | 16,067 |
| ABBOTT LABORATORIES | 18,663 | 18,663 |
| TJX COS INC/THE | 16,672 | 16,672 |
| AXON ENTERPRISE INC | 74,290 | 74,290 |
| FASTENAL CO | 16,180 | 16,180 |
| CIBC ATLAS ALL CAP GROWTH FUND | 216,453 | 216,453 |
| INGERSOLL RAND INC | 16,101 | 16,101 |
| AUTODESK INC | 69,459 | 69,459 |
| TARGET CORP | 28,253 | 28,253 |
| DEXCOM INC | 28,231 | 28,231 |
| NASDAQ INC | 71,666 | 71,666 |
| BLACKSTONE INC | 25,863 | 25,863 |
| PAYCHEX INC | 27,904 | 27,904 |
| EXPEDITORS INTERNATIONAL OF WASHNGTN INC | 27,803 | 27,803 |
| ALPHABET INC CLASS C | 72,748 | 72,748 |
| APPLOVIN CORP CL A | 39,183 | 39,183 |
| MONSTER BEVERAGE CORP | 14,822 | 14,822 |
| HENRY SCHEIN INC | 14,809 | 14,809 |
| STARBUCKS CORP | 35,861 | 35,861 |
| MOHAWK INDS INC | 10,722 | 10,722 |
| NORTHERN TRUST CORP | 1,027 | 1,027 |
| PROCORE TECHNOLOGIES INC | 2,548 | 2,548 |
| TRAVELERS COS INC/ THE | 18,308 | 18,308 |
| ARTHUR J GALLAGHER & CO | 25,547 | 25,547 |
| JPMORGAN CHASE & CO | 25,170 | 25,170 |
| FLEX LTD | 24,992 | 24,992 |
| ABBVIE INC | 61,908 | 61,908 |
| DOMINION ENERGY INC | 60,862 | 60,862 |
| SHOPIFY INC | 60,821 | 60,821 |
| TE CONNECTIVITY PLC | 21,017 | 21,017 |
| DIAMONDBACK ENERGY INC | 31,292 | 31,292 |
| PG&E CORPORATION | 17,879 | 17,879 |
| COPART INC | 18,135 | 18,135 |
| VULCAN MATERIALS COMPANY | 22,122 | 22,122 |
| ADOBE INC | 22,234 | 22,234 |
| GLOBAL PAYMENTS INC | 21,740 | 21,740 |
| QUALCOMM INC | 22,275 | 22,275 |
| INSULET CORP | 22,973 | 22,973 |
| RAYMOND JAMES FINANCIAL | 22,989 | 22,989 |
| MICROCHIP TECHNOLOGY INC | 1,606 | 1,606 |
| WEC ENERGY GROUP INC | 7,053 | 7,053 |
| FREEPORT-MCMORAN INC | 6,930 | 6,930 |
| POLARIS INC | 6,857 | 6,857 |
| MICROSOFT CORP | 105,797 | 105,797 |
| BLOCK INC CL A | 32,041 | 32,041 |
| FACTSET RESEARCH SYSTEMS INC | 31,698 | 31,698 |
| ARES MANAGEMENT CORP | 29,387 | 29,387 |
| O'REILLY AUTOMOTIVE INC | 8,301 | 8,301 |
| KROGER COMPANY COMMON | 10,762 | 10,762 |
| LOWES COMPANIES INC | 52,568 | 52,568 |
| T-MOBILE US INC | 10,816 | 10,816 |
| COPART INC | 10,675 | 10,675 |
| MARVELL TECHNOLOGY INC | 12,260 | 12,260 |
| DEXCOM INC | 7,466 | 7,466 |
| MICROCHIP TECHNOLOGY INC | 5,276 | 5,276 |
| MASTERCARD INC CL A | 5,266 | 5,266 |
| CINTAS CORP | 8,770 | 8,770 |
| HALLIBURTON COMPANY | 2,691 | 2,691 |
| NORTHERN TRUST CORP | 3,559 | 3,559 |
| ASTRAZENECA PLC | 3,473 | 3,473 |
| ABB LTD -SPONS ADR | 3,437 | 3,437 |
| ARTHUR J GALLAGHER & CO | 7,380 | 7,380 |
| LABCORP HOLDINGS INC | 5,045 | 5,045 |
| HUBBELL INC | 10,472 | 10,472 |
| INVESCO QQQ TRUST | 516,342 | 516,342 |
| MSCI INC | 7,800 | 7,800 |
| KEYSIGHT TECHNOLOGIES INC | 7,871 | 7,871 |
| BLUE OWL CAP INC CL A | 7,722 | 7,722 |
| UNIVERSAL HEALTH SERVICES | 7,894 | 7,894 |
| VISA INC CLASS A | 7,901 | 7,901 |
| YUM CHINA HOLDINGS INC | 7,900 | 7,900 |
| ZSCALER INC | 8,479 | 8,479 |
| GLOBUS MEDICAL INC NEW | 12,241 | 12,241 |
| AVANTOR INC | 3,308 | 3,308 |
| PACKAGING CORP OF AMER | 10,131 | 10,131 |
| WASTE CONNECTIONS INC | 10,981 | 10,981 |
| AMERICAN HOMES 4 RENT | 10,927 | 10,927 |
| US FOODS HOLDING CORP | 10,861 | 10,861 |
| SALESFORCE INC | 78,902 | 78,902 |
| TAPESTRY INC | 25,609 | 25,609 |
| PROGRESSIVE CORP OHIO | 92,489 | 92,489 |
| MSCI INC | 25,800 | 25,800 |
| MASCO CORP | 6,386 | 6,386 |
| ASCENDIS PHARMA A/S ADR | 34,555 | 34,555 |
| INTUITIVE SURGICAL INC | 37,581 | 37,581 |
| AMERIPRISE FINANCIAL | 26,089 | 26,089 |
| LOEWS CORPORATION | 26,000 | 26,000 |
| ELI LILLY & CO | 37,056 | 37,056 |
| ILLINOIS TOOL WORKS INC | 37,019 | 37,019 |
| PFIZER INCORPORATED | 36,771 | 36,771 |
| MONDELEZ INTL INC | 47,127 | 47,127 |
| SALESFORCE INC | 30,090 | 30,090 |
| PACCAR INC | 47,225 | 47,225 |
| BOEING CO | 47,436 | 47,436 |
| PALANTIR TECHNOLOGIES | 48,554 | 48,554 |
| LOCKHEED MARTIN CORP | 31,100 | 31,100 |
| VISA INC | 49,302 | 49,302 |
| LENNAR CORPORATION | 49,502 | 49,502 |
| GENL DYNAMICS CORP | 49,536 | 49,536 |
| WEC ENERGY GROUP INC | 25,673 | 25,673 |
| RTX CORP | 54,273 | 54,273 |
| PHILIP MORRIS | 33,578 | 33,578 |
| QUALCOMM INC | 34,565 | 34,565 |
| COTERRA ENERCOTERRA | 15,401 | 15,401 |
| BLACKROCK INC | 15,377 | 15,377 |
| SPROUTS FARMERS MARKET INC | 15,375 | 15,375 |
| ALPHABET INC CLASS A | 82,156 | 82,156 |
| DUKE ENERGY CORP | 43,850 | 43,850 |
| WILLIAMS COMPANIES | 43,783 | 43,783 |
| TEXAS INSTRUMENTS INC | 74,441 | 74,441 |
| ATLASSIAN CORP PLC CL A | 32,613 | 32,613 |
| REGENCY CENTERS CORP | 15,304 | 15,304 |
| COMCAST CORP NEW CL A | 15,012 | 15,012 |
| NVIDIA CORP | 88,631 | 88,631 |
| ANALOG DEVICES INC | 86,046 | 86,046 |
| MARSH AND MC LENNAN | 62,236 | 62,236 |
| STARBUCKS CORP | 25,550 | 25,550 |
| MCKESSON CORPORATION | 63,260 | 63,260 |
| THE CIGNA GROUP | 64,341 | 64,341 |
| ONEOK INC NEW | 6,526 | 6,526 |
| FORTIVE CORP | 6,675 | 6,675 |
| LYONDELLBASELL INDUSTRIES AF SCA CLASS A | 6,684 | 6,684 |
| VALVOLINE INC | 4,450 | 4,450 |
| HOST HOTELS & RESORTS | 7,725 | 7,725 |
| KKR & CO INC | 104,129 | 104,129 |
| VERTIV HOLDINGS LLC | 44,876 | 44,876 |
| VERTEX PHARMACEUTICALS INC | 49,935 | 49,935 |
| TRACTOR SUPPLY COMPANY | 12,469 | 12,469 |
| RPM INTERNATIONAL INC | 12,429 | 12,429 |
| MONOLITHIC POWER SYSTEMS INC | 8,876 | 8,876 |
| CHENIERE ENERGY INC | 15,471 | 15,471 |
| WARNER MUSIC GRP CORP | 9,579 | 9,579 |
| NEXTERA ENERGY INC | 15,485 | 15,485 |
| ROPER TECHNOLOGIES INC | 15,596 | 15,596 |
| AUTOMATIC DATA | 14,051 | 14,051 |
| PROLOGIS INC | 13,952 | 13,952 |
| LIVE NATION | 13,857 | 13,857 |
| ITT INC | 14,860 | 14,860 |
| S&P GLOBAL INC | 14,941 | 14,941 |

# TY 2024 IRS 990 e-File Render

| | |
|---|---|
| **Name:** | THE LASZLO N TAUBER FAMILY FOUNDATION INC |
| **EIN:** | 30-0208793 |
| **US Government Securities - End of Year Book Value:** | 1,298,868 |
| **US Government Securities - End of Year Fair Market Value:** | 1,298,868 |
| **State & Local Government Securities - End of Year Book Value:** | 0 |
| **State & Local Government Securities - End of Year Fair Market Value:** | 0 |

# TY 2024 IRS 990 e-File Render

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Category/ Item | Listed at Cost or FMV | Book Value | End of Year Fair Market Value |
|---|---|---|---|
| ROCKET GLOBAL INNOVATION FUND (OFF) | FMV | 814,434 | 814,434 |
| CPJV | FMV | 3,963,679 | 3,963,679 |
| CP REAL ESTATE | FMV | 1,007,537 | 1,007,537 |
| GROUP P JV | FMV | 3,526,380 | 3,526,380 |
| CPLP | FMV | 11,257,412 | 11,257,412 |
| APOLLO EUROP FIN ACCESS III (OFF) | FMV | 702,599 | 702,599 |
| KING STREET CAPITAL LTD | FMV | 14,896 | 14,896 |
| ATLAS POINT DURABLE GROWTH | FMV | 488,349 | 488,349 |

# TY 2024 IRS 990 e-File Render

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Description | Revenue and Expenses per Books | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|---|---|---|---|---|
| OFFICE EXPENSES | 9,284 | 5,570 | | 3,714 |
| EVENTS | 22,704 | 0 | | 22,704 |

# TY 2024 IRS 990 e-File Render

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Description | Revenue And Expenses Per Books | Net Investment Income | Adjusted Net Income |
|---|---|---|---|
| PARTNERSHIP ORD. INCOME | 1,578,966 | 1,452,529 | 0 |

# TY 2024 IRS 990 e-File Render

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Description | Amount |
| --- | --- |
| UNREALIZED GAIN | 843,870 |

# TY 2024 IRS 990 e-File Render

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Category | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|---|---|---|---|---|
| INVESTMENT MANAGEMENT FEES | 82,686 | 82,686 | | 0 |
| ADMINISTRATIVE SUPPORT SERVICES | 410,927 | 328,742 | | 82,185 |

# TY 2024 IRS 990 e-File Render

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Category | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|---|---|---|---|---|
| FEDERAL EXCISE TAXES | 44,700 | 0 | | 0 |
| FOREIGN TAXES | 2,008 | 2,008 | | 0 |

# TY 2024 IRS 990 e-File Render

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Name | US / Foreign Address | EIN | Description | Amount |
|---|---|---|---|---|
| CP REAL ESTATE LLC | 2440 VIRGINIA AVENUE NW 910<br>WASHINGTON, DC 20037 | 72-1519575 | $39,798 WAS TRANSFERRED FROM THE CONTROLLED ENTITY IN 2024. | 0 |
| GROUP P JOINT VENTURE | 2440 RESEARCH BLVD SUITE 440<br>ROCKVILLE, MD 20850 | 52-1776614 | $137,901 WAS TRANSFERRED FROM THE CONTROLLED ENTITY IN 2024. | 0 |
| **Total** | | | | 177,699 |

# TY 2024 IRS 990 e-File Render

**Name:** THE LASZLO N TAUBER FAMILY FOUNDATION INC

**EIN:** 30-0208793

| Name | US / Foreign Address | EIN | Description | Amount |
|---|---|---|---|---|
| CP REAL ESTATE LLC | 2440 VIRGINIA AVENUE NW 910<br>WASHINGTON, DC 20037 | 72-1519575 | NO TRANSFERS WERE MADE TO THE CONTROLLED ENTITY IN 2024. | 0 |
| GROUP P JOINT VENTURE | 2440 RESEARCH BLVD SUITE 440<br>ROCKVILLE, MD 20850 | 52-1776614 | NO TRANSFERS WERE MADE TO THE CONTROLLED ENTITY IN 2024. | 0 |
| **Total** | | | | 0 |