

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

Name of foundation THE BAUM FAMILY FOUNDATION		A Employer identification number 35-2481660	
Number and street (or P.O. box number if mail is not delivered to street address) 4801 MAIN STREET 500	Room/suite	B Telephone number (see instructions) (816) 842-0944	
City or town, state or province, country, and ZIP or foreign postal code KANSAS CITY, MO 64112		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>34,677,711</u>	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	8,417	8,417		
	4 Dividends and interest from securities	583,994	583,994		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	842,418			
	b Gross sales price for all assets on line 6a _____ 9,967,127				
	7 Capital gain net income (from Part IV, line 2)		842,418		
	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)	48,481	106,109	0	
	12 Total. Add lines 1 through 11	1,483,310	1,540,938	0	
	13 Compensation of officers, directors, trustees, etc.	0	0	0	0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	21,403	10,702	0	10,702
	b Accounting fees (attach schedule)	4,000	2,000	0	2,000
	c Other professional fees (attach schedule)	245,602	227,352	0	18,250
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	13,238	0	0	0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)		68,671		
	24 Total operating and administrative expenses. Add lines 13 through 23	284,243	308,725	0	30,952
	25 Contributions, gifts, grants paid	2,816,666			2,816,666
	26 Total expenses and disbursements. Add lines 24 and 25	3,100,909	308,725	0	2,847,618
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-1,617,599			
	b Net investment income (if negative, enter -0-)		1,232,213		
	c Adjusted net income (if negative, enter -0-)			0	

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		407,948	170,516	170,516
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)	25,323,570	23,897,676	29,620,949	
	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)				
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)	3,857,727	4,394,772	4,886,246		
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	29,589,245	28,462,964	34,677,711		
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	29,589,245	28,462,964		
	29	Total net assets or fund balances (see instructions)	29,589,245	28,462,964		
	30	Total liabilities and net assets/fund balances (see instructions) .	29,589,245	28,462,964		

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	29,589,245
2	Enter amount from Part I, line 27a	2	-1,617,599
3	Other increases not included in line 2 (itemize) ▶ _____	3	491,318
4	Add lines 1, 2, and 3	4	28,462,964
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	28,462,964

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 CAPITAL GAIN DISTRIBUTIONS				2024-12-31
b PUBLICLY TRADED SECURITIES				2024-12-31
c PUBLICLY TRADED SECURITIES				2024-12-31
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 9,155			9,155
b 4,045,714		3,826,226	219,488
c 5,912,258		5,298,483	613,775
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a			9,155
b			219,488
c			613,775
d			
e			

2 Capital gain net income or (net capital loss)

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

If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7

2

3

842,418

219,488

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	17,128
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	17,128
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	17,128
6	Credits/Payments:		
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	24,276
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	5,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	29,276
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	12,148
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	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? <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) ▶MO			
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 ▶N/A	13	Yes	
14	The books are in care of ▶GREATER KANSAS CITY COMMUNITY FOUND Telephone no. ▶(816) 842-0944 Located at ▶1055 BROADWAY SUITE 130 KANSAS CITY MO ZIP+4 ▶64105			
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.

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)	No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)	No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	No
(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	
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))?

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?
If "Yes," attach the statement required by Regulations section 53.4945–5(d).

5d

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?
If "Yes" to 6b, file Form 8870.

6b

No

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
ANN KAUFMANN BAUM 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105	VICE PRESIDENT 1.00	0	0	0
JONATHAN E BAUM 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105	TREASURER 1.00	0	0	0
JANICE C KREAMER 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105	TRUSTEE 1.00	0	0	0
BRUCE C DAVISON 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105	TRUSTEE 1.00	0	0	0
LISA KLEIN 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105	TRUSTEE 1.00	0	0	0
SARAH BAUM 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105	PRESIDENT 1.00	0	0	0
JOHN KEARNEY 1055 BROADWAY SUITE 130 KANSAS CITY, MO 64105	TRUSTEE 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
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
NONE		

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	

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	34,187,698
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	34,187,698
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	34,187,698
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	512,815
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	33,674,883
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	1,683,744

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	1,683,744
2a	Tax on investment income for 2024 from Part V, line 5.	2a	17,128
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	18,166
c	Add lines 2a and 2b.	2c	35,294
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,648,450
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,648,450
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	1,648,450

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	2,847,618
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	2,847,618

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				1,648,450
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.			123,078	
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: ▶ \$ 2,847,618				
a Applied to 2023, but not more than line 2a			123,078	
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				1,648,450
e Remaining amount distributed out of corpus	1,076,090			
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	1,076,090			
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)	0			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	1,076,090			
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	1,076,090			

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

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

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

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

c Any submission deadlines:

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

Part

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMETHYST PLACE 2735 TROOST AVE KANSAS CITY,MO 64109	NONE	P C	SOCIETAL BENEFIT	250,000
BE GREAT TOGETHER INC 4741 CENTRAL ST SUITE 141 KANSAS CITY,MO 64112	NONE	P C	EDUCATIONAL	50,000
BOYS & GIRLS CLUB OF GREATR KANSAS CITY 4001 BLUE PARKWAY SUITE 102 KANSAS CITY,MO 64130	NONE	P C	SOCIETAL BENEFIT	284,000
CHILD PROTECTION CENTER 2940 MAIN STREET KANSAS CITY,MO 64108	NONE	P C	SOCIETAL BENEFIT	20,000
DELASALLE EDUCATION CENTER 3737 TROOST AVENUE KANSAS CITY,MO 64109	NONE	P C	EDUCATIONAL	100,000
DELLA LAMB COMMUNITY SERVICES 500 WOODLAND AVENUE KANSAS CITY,MO 64106	NONE	P C	EDUCATIONAL	100,000
EARLY START 2008 E 12TH STREET KANSAS CITY,MO 64127	NONE	P C	EDUCATIONAL	110,000
EL CENTRO 650 MINNESOTA AVENUE KANSAS CITY,MO 66101	NONE	P C	EDUCATIONAL	75,000
EMMANUEL FAMILY CHILD DEVELOPMENT CENTER 4736 PROSPECT AVENUE KANSAS CITY,MO 64130	NONE	P C	EDUCATIONAL	100,000
GRANDPARENTS FOR GUN SAFETY PO BOX 11193 OVERLAND PARK,KS 66207	NONE	P C	SOCIETAL BENEFIT	1,000
GUADALUPE CENTERS 1015 AVENIDA CESAR KANSAS CITY,MO 64108	NONE	P C	SOCIETAL BENEFIT	75,000
HIGGINS BROTHERS SURGICENTER OF HOPE 6720 OVERHILL RD MISSION HILLS,KS 66208	NONE	P C	MEDICAL PRACTICE & RESEARCH	1,000
HISPANIC DEVELOPMENT FUND 1055 BROADWAY BLVD STE 100 KANSAS CITY,MO 64105	NONE	P C	SOCIETAL BENEFIT	7,500
JUNIOR ACHIEVEMENT OF GREATER KANSAS CITY 2842 W 47TH AVENUE KANSAS CITY,MO 66103	NONE	P C	EDUCATIONAL	100,000
KANSAS CITY FRIENDS OF ALVIN AILEY 1714 E 18TH STREET	NONE	P C	SOCIETAL BENEFIT	7,500

KANSAS CITY,MO 64108				
KANSAS CITY GIFT 5008 PROPSECT AVENUE KANSAS CITY,MO 64130	NONE	P C	SOCIETAL BENEFIT	105,000
LEAD TO READ PO BOX 411006 KANSAS CITY,MO 64141	NONE	P C	EDUCATIONAL	50,000
LEGAL AID OF WESTERN MISSOURI 4001 DR MARTIN LUTHER KING BLVD SUITE 300 KANSAS CITY,MO 64130	NONE	P C	SOCIAL BENEFIT	5,000
MINDDRIVE 2615 HOLMES STREET KANSAS CITY,MO 64108	NONE	P C	EDUCATIONAL	50,000
NO DIVIDE KC 3925 GENESSEE STREET KANSAS CITY,MO 64111	NONE	P C	SOCIETAL BENEFIT	55,000
OPERATION BREAKTHROUGH 3039 TROOST AVENUE KANSAS CITY,MO 64109	NONE	P C	SOCIAL BENEFIT	247,166
PRINCIPAL CONNECT 17 JANSSEN PLACE KANSAS CITY,MO 64109	NONE	P C	EDUCATIONAL	6,000
ROCKHURST UNIVERSITY 1100 ROCKHURST ROAD MASSMAN 240 KANSAS CITY,MO 64110	NONE	P C	EDUCATIONAL	63,500
SHEFFIELD PLACE 6604 E 12TH STREET KANSAS CITY,MO 64126	NONE	P C	SOCIETAL BENEFIT	250,000
SYNERGY SERVICES 400 E 6TH STREET PARKVILLE,MO 64152	NONE	P C	SOCIETAL BENEFIT	200,000
THE RABBIT HOLE 919 E 14TH AVENUE NORTH KANSAS CITY,MO 64116	NONE	P C	SOCIETAL BENEFIT	100,000
UMKC WOMEN'S COUNCIL 5115 OAK STREET AB-300 B KANSAS CITY,MO 64112	NONE	P C	EDUCATIONAL	2,500
UNCORNERED 222 BOWDOIN STREET DORCHESTER,MA 02124	NONE	P C	EDUCATIONAL	1,500
VIBRANT HEALTH KC 21 N 12TH STREET STE 300 KANSAS CITY,KS 66102	NONE	P C	MEDICAL PRACTICE & RESEARCH	200,000
WECODEKC 4741 CENTRAL ST SUITE 222 KANSAS CITY,MO 64112	NONE	P C	EDUCATIONAL	200,000
Total ▶ 3a				2,816,666

				
b Approved for future payment				
BE GREAT TOGETHER INC 4741 CENTRAL ST SUITE 141 KANSAS CITY,MO 64112	NONE	P C	EDUCATIONAL	50,000
BOYS & GIRLS CLUB OF GREATR KANSAS CITY	NONE	P C	SOCIETAL BENEFIT	300,000

4001 BLUE PARKWAY SUITE 102 KANSAS CITY,M O 64130				
DELASALLE EDUCATION CENTER 3737 TROOST AVENUE KANSAS CITY,M O 64109	NONE	P C	EDUCATIONAL	200,000
KANSAS CITY GIFT 5008 PROPECT AVENUE KANSAS CITY,M O 64130	NONE	P C	SOCIETAL BENEFIT	75,000
LEAD TO READ PO BOX 411006 KANSAS CITY,M O 64141	NONE	P C	EDUCATIONAL	50,000
OPERATION BREAKTHROUGH 3039 TROOST AVENUE KANSAS CITY,M O 64109	NONE	P C	SOCIAL BENEFIT	333,334
SAVE INC PO BOX 45301 KANSAS CITY,M O 64171	NONE	P C	SOCIAL BENEFIT	200,000
SYNERGY SERVICES 400 E 6TH STREET PARKVILLE,M O 64152	NONE	P C	SOCIETAL BENEFIT	400,000
THE RABBIT HOLE 919 E 14TH AVENUE NORTH KANSAS CITY,M O 64116	NONE	P C	SOCIETAL BENEFIT	100,000
VIBRANT HEALTH KC 21 N 12TH STREET STE 300 KANSAS CITY,KS 66102	NONE	P C	MEDICAL PRACTICE & RESEARCH	400,000
Total ▶ 3b				2,108,334

Enter gross amounts unless otherwise indicated.

3	Total. Add line 12, columns (b), (d), and (e).	13	<u>1,483,310</u>
(See worksheet in line 13 instructions to verify calculations.)			

[illegible]

Part XVI

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

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

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

(1) Cash.

(2) Other assets.

b Other transactions:

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

(2) Purchases of assets from a noncharitable exempt organization

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

(4) Reimbursement arrangements.

(5) Loans or loan guarantees.

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

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

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

[illegible]

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

b If "Yes," complete the following schedule.

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

Sign Here

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

	2025-11-08
Signature of officer or trustee	Date

2025-11-08

Title

May the IRS discuss this return with the preparer shown below?
See instructions. ☐ Yes ☐ No

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	ERIN S MORGAN				P00710515
	Firm's name ▶ RUBINBROWN LLP				Firm's EIN ▶ 43-076531
	Firm's address ▶ 1200 MAIN STREET SUITE 1000 KANSAS CITY, MO 64105				Phone no. (816) 472-1122

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 BAUM FAMILY FOUNDATION
EIN: 35-2481660

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING & TAX SERVICE	4,000	2,000	0	2,000

TY 2024 IRS 990 e-File Render

Name: THE BAUM FAMILY FOUNDATION
EIN: 35-2481660

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ARTISAN INTERNATIONAL VALUE FUND	342,597	357,026
BLACKROCK HIGH YIELD BOND	1,184,021	1,129,419
FIDELITY 500 INDEX	11,984,504	17,092,273
FIDELITY INTL	402,188	418,260
HEALTHCARE SELECT SECTOR	285,960	304,993
INVESCO ETF TR S&P	515,710	580,712
INVESCO QQQ	1,346,320	2,049,521
ISHARES INC MSCI JAPAN	378,207	374,888
ISHARES TR BARCLAYS	1,042,140	978,398
ISHARES TRUST S&P MIDCAP	364,284	434,176
JP MORGAN EXCHANGE-TRADED FUND	164,376	194,899
PRUDENTIAL HIGH YIELD FUND	656,580	574,892
SPDR INDEX SHS	91,804	90,618
VANECK GOLD	295,977	273,586
VANECK OIL SERVICES	322,448	380,807
VANGUARD FTSE EUROPE	334,165	325,030
VANGUARD TOTAL BOND MARKET	2,317,953	2,128,300
WISDOMTREE JAPAN HEDGE EQUITY	195,864	197,860
DODGE & COX INCOME FD	287,051	284,751
CONSUMER DISCRETIONARY SELECT SECTOR	90,736	94,676
FINANCIAL SELECT SECTOR SPDR	511,710	562,223
INDUSTRIAL SELECT SECTOR SPDR	91,585	85,776
ISHARES INC MSCI UTD KINGD	149,380	147,702
ISHARES TR MSCI EURO	152,924	159,372
VANECK ETF TRUST SEMICONDUCTOR	389,192	400,791

TY 2024 IRS 990 e-File Render

Name: THE BAUM FAMILY FOUNDATION
EIN: 35-2481660

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	21,403	10,702	0	10,702

TY 2024 IRS 990 e-File Render

Name: THE BAUM FAMILY FOUNDATION

EIN: 35-2481660

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
SVSS V PRIVATE OMVESTPRS OFFSHORE	131,250	193,750	256,529
GKB GROWTH EQUITY FUND	152,496	137,918	351,916
PSG ENCORE/CO-INVEST J OFFSHORE	173,360	261,770	232,995
COATUE ASIA OFFSHORE FUND I PRIVATE INVESTORS LT HF CLASS	251,179	31,873	28,502
PSG V PRIVATE INVESTORS OFFSHORE	167,374	214,973	262,143
NEA 18 PRIVATE INVESTORS OFFSHORE	246,559	481,853	456,895
ASF VII INFRASTRUCTURE PRIVATE INVESTORS OFFSHORE	180,949	241,044	277,224
RC II PRIVATE INVESTORS OFFSHORE	210,075	214,050	203,710
PE OFFSHORE LP CLASS A	219,874	217,472	265,784
COATUE GROWTH PRIVATE INVESTORS OFFSHORE LP DIK CLASS A-3 CLOSE EQT	426,474	432,695	331,529
FLINT HILLS FOUNDERS II LP	312,039	293,308	290,254
EQT INFRASTRUCTURE PRIVATE INVESTORS OFFSHORE	358,155	402,667	514,948
COATUE CLIMATE TECH OFFSHORE FEEDER FUND II LP	500,000	500,000	641,994
FLINT HILLS ASCENT CO-INVEST II LP	527,943	561,454	528,497
INDUSTRY VENTURES X PRIVATE INVESTORS OFFSHORE	0	67,439	85,399
SLP VII PRIVATE INVESTORS OFFSHORE	0	94,430	109,850
VINTAGE 2024 PRIVATE INVESTMENT OFFSHORE	0	48,076	48,077

TY 2024 IRS 990 e-File Render

Name: THE BAUM FAMILY FOUNDATION

EIN: 35-2481660

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP INCOME	48,481	106,109	0

TY 2024 IRS 990 e-File Render

Name: THE BAUM FAMILY FOUNDATION

EIN: 35-2481660

Description	Amount
BOOK/TAX TIMING DIFFERENCE	491,318

TY 2024 IRS 990 e-File Render

Name: THE BAUM FAMILY FOUNDATION
EIN: 35-2481660

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	209,102	209,102	0	0
ADMINISTRATION FEES	36,500	18,250	0	18,250

TY 2024 IRS 990 e-File Render

Name: THE BAUM FAMILY FOUNDATION

EIN: 35-2481660

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	13,238	0	0	0