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 SHERWOOD FOUNDATION

A Employer identification number
47-0824755

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
808 CONAGRA DRIVE 200

B Telephone number (see instructions)
(402) 341-1717

City or town, state or province, country, and ZIP or foreign postal code
OMAHA, NE 68102

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)* ▶$ 716,342,304

J Accounting method: ☐ Cash ☐ Accrual ☑ Other (specify) Modified Cash Basi
(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)	430,567,280			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	7,979,435	7,979,435		
	4	Dividends and interest from securities	1,314,365	1,314,365		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	212,828,941			
	b	Gross sales price for all assets on line 6a 214,913,528				
	7	Capital gain net income (from Part IV, line 2)		212,828,941		
	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)	368,705	368,705		
	12	**Total.** Add lines 1 through 11	653,058,726	222,491,446		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	794,829	58,302		736,527
	14	Other employee salaries and wages	1,527,956	0		1,527,956
	15	Pension plans, employee benefits	760,223	23,094		737,129
	16a	Legal fees (attach schedule)	128,974	0		128,974
	b	Accounting fees (attach schedule)	44,989	0		44,989
	c	Other professional fees (attach schedule)	2,919,109	29,079		2,890,030
	17	Interest	32	0		32
	18	Taxes (attach schedule) (see instructions)	2,571,679	335		128,471
	19	Depreciation (attach schedule) and depletion	1,013,966	0		
	20	Occupancy	335,810	0		335,810
	21	Travel, conferences, and meetings	72,050	0		72,050
	22	Printing and publications	8,206	0		8,206
	23	Other expenses (attach schedule)	1,581,185	368,705		1,212,480
	24	**Total operating and administrative expenses.** Add lines 13 through 23	11,759,008	479,515		7,822,654
	25	Contributions, gifts, grants paid	256,149,756			256,149,756
	26	**Total expenses and disbursements.** Add lines 24 and 25	267,908,764	479,515		263,972,410
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	385,149,962			
	b	**Net investment income** (if negative, enter -0-)		222,011,931		
	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	345,323	165,789	165,789
	2	Savings and temporary cash investments	13,462,219	288,220,330	288,220,330
	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)	132,935,638	1,380,771	1,380,771
	b	Investments—corporate stock (attach schedule)	260,810,677	363,665,726	363,665,726
	c	Investments—corporate bonds (attach schedule)	1,393,530	2,936,536	2,936,536
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans	801,145	756,918	756,918
	13	Investments—other (attach schedule)	25,268,590	26,455,385	26,455,385
	14	Land, buildings, and equipment: basis ▶ 988,334			
		Less: accumulated depreciation (attach schedule) ▶ 868,976	189,999	119,358	119,358
	15	Other assets (describe ▶)	24,741,571	32,641,491	32,641,491
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	459,948,692	716,342,304	716,342,304
Liabilities	17	Accounts payable and accrued expenses	65,526	97,291	
	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 ▶)	1,349,818	1,249,818	
	23	**Total liabilities**(add lines 17 through 22)	1,415,344	1,347,109	
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	458,533,348	714,995,195	
	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			
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds			
	29	**Total net assets or fund balances** (see instructions)	458,533,348	714,995,195	
	30	**Total liabilities and net assets/fund balances** (see instructions)	459,948,692	716,342,304	

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	458,533,348
2	Enter amount from Part I, line 27a	2	385,149,962
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	843,683,310
5	Decreases not included in line 2 (itemize) ▶	5	128,688,115
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	714,995,195

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a	PUBLICLY TRADED SECURITIES	P	2024-01-01	2024-12-31
b	PUBLICLY TRADED SECURITIES	P	2023-01-01	2024-12-31
c	BERKSHIRE HATHAWAY CL B	D	2023-01-01	2024-12-31
d	CAPITAL GAINS DIVIDENDS	P		
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	143,787		151,088	-7,301
b	1,832,072		1,923,304	-91,232
c	212,936,375		10,195	212,926,180
d	1,294			1,294
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				-7,301
b				-91,232
c				212,926,180
d				1,294
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	212,828,941
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	3,085,966
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	3,085,966
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	3,085,966
6	Credits/Payments:				
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	4,400,100		
b	Exempt foreign organizations—tax withheld at source	6b	0		
c	Tax paid with application for extension of time to file (Form 8868)	6c	0		
d	Backup withholding erroneously withheld	6d	0		
7	Total credits and payments. Add lines 6a through 6d			7	4,400,100
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	1,314,134
11	Enter the amount of line 10 to be: **Credited to 2025 estimated tax** ▶ 1,314,134	**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		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *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) ▶ NE			
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		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ WWW.SHERWOODFOUNDATION.ORG	13	Yes	
14	The books are in care of ▶ SHARI LECCI Telephone no. ▶ (402) 341-1717 Located at ▶ 808 CONAGRA DRIVE STE 200 OMAHA NE ZIP+4 ▶ 68102			
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 ▶	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)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes	
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)		No
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		No
c	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2024?	1d		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024?	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		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)*

			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)	Yes	
	(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		No
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	Yes	
	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
SUSAN A BUFFETT 808 CONAGRA DRIVE SUITE 200 OMAHA, NE 68102	CHAIRMAN 40.00	561,621	121,233	0
SHARI LECCI 808 CONAGRA DRIVE SUITE 200 OMAHA, NE 68102	VP OF FINANCE 40.00	233,208	92,375	0
RICHARD PUTNAM 1500 WOODMEN TOWER OMAHA, NE 68102	SECRETARY & LEGAL COUNSEL 2.00	0	0	0
MICHAEL GREENBERG 808 CONAGRA DRIVE SUITE 200 OMAHA, NE 68102	MEMBER 2.00	0	0	0
EMILY GREENBERG 808 CONAGRA DRIVE SUITE 200 OMAHA, NE 68102	MEMBER 2.00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
KERRI SANCHEZ 808 CONAGRA DRIVE SUITE 200 OMAHA,NE 68102	VP OF URBAN INITIATI 40.00	238,409	115,788	0
MICHELLE ZYCH 808 CONAGRA DRIVE SUITE 200 OMAHA,NE 68102	VP OF COMMUNITY INIT 40.00	216,026	90,165	0
ERIN BOCK 808 CONAGRA DRIVE SUITE 200 OMAHA,NE 68102	VP OF HOUSING AND ED 40.00	225,126	80,892	0
ROBERTA WILHELM 808 CONAGRA DRIVE SUITE 200 OMAHA,NE 68102	VP OF CAPACITY BUILD 40.00	210,323	63,166	0
TESS LARSON 808 CONAGRA DRIVE SUITE 200 OMAHA,NE 68102	PROGRAM VP 40.00	145,189	44,299	0
Total number of other employees paid over $50,000 ▶				2

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
RIFE CONSTRUCTION 4515 MILITARY AVE OMAHA,NE 68104	CONSTRUCTION	4,367,198
CLARK CREATIVE ADVERTISING INC 514 SOUTH 13TH STREET OMAHA,NE 68102	CONSULTING	890,174
CATEGORY ONE CONSULTING 6017 N HWS CLEVELAND BLVD OMAHA,NE 68116	CONSULTING	739,600
SYNCQUIP LLC 5501 S 36TH STREET OMAHA,NE 68107	CONSULTING	606,441
NOLA PROJECT MANAGEMENT 11047 S LAKESHORT DRIVE BLAIR,NE 68008	CONSULTING	480,334

Total number of others receiving over $50,000 for professional services. . . . . ▶ 9

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 THE SHERWOOD FOUNDATION (SHERWOOD) ACQUIRED SEVERAL LAND PARCELS LOCATED IN CERTAIN ECONOMICALLY DEPRESSED AREAS OF OMAHA, NE. SHERWOOD'S INTENTION IS TO EITHER DONATE OR SELL THE LAND TO OTHER BUSINESSES OR NONPROFITS THAT WILL USE THE LAND IN REDEVELOPMENT AND NEIGHBORHOOD IMPROVEMENT PROJECTS. THE LAND PARCELS WILL BE HELD AND MAINTAINED BY SHERWOOD UNTIL BUYERS WITH APPROVED DEVELOPMENT OBJECTIVES ARE FOUND.	10,387,053
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 . . . . . ▶	10,387,053

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	509,848,048
b	Average of monthly cash balances			1b	38,164,218
c	Fair market value of all other assets (see instructions)			1c	0
d	**Total** (add lines 1a, b, and c)			1d	548,012,266
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	548,012,266
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)			4	8,220,184
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3			5	539,792,082
6	**Minimum investment return.** Enter 5% (0.05) of line 5			6	26,989,604

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	26,989,604
2a	Tax on investment income for 2024 from Part V, line 5	2a	3,085,966		
b	Income tax for 2024. (This does not include the tax from Part V.)	2b			
c	Add lines 2a and 2b			2c	3,085,966
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	23,903,638
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	23,903,638
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	23,903,638

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	263,972,410
b	Program-related investments—total from Part VIII-B	1b	10,387,053
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	23,866
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	274,383,329

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				23,903,638
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. 226,329,914				
b From 2020. 218,959,838				
c From 2021. 296,858,568				
d From 2022. 233,693,647				
e From 2023. 198,982,505				
f **Total** of lines 3a through e	1,174,824,472			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ $ 274,383,329				
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				23,903,638
e Remaining amount distributed out of corpus	250,479,691			
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	1,425,304,163			
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) . . .	226,329,914			
9 **Excess distributions carryover to 2025.** Subtract lines 7 and 8 from line 6a	1,198,974,249			
10 Analysis of line 9:				
a Excess from 2020 218,959,838				
b Excess from 2021 296,858,568				
c Excess from 2022. . . . 233,693,647				
d Excess from 2023 198,982,505				
e Excess from 2024 250,479,691				

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 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	7,979,435	
4 Dividends and interest from securities			14	1,314,365	
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			16	368,705	
8 Gain or (loss) from sales of assets other than inventory			18	212,828,941	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		222,491,446	0
13 **Total.** Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				**13**	222,491,446

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 2025-05-06 — ▶ 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
WENDY R COOLEY CPA		2025-05-06		P01523804
Firm's name ▶ EIDE BAILLY LLP				Firm's EIN ▶45-0250958
Firm's address ▶ 18081 BURT ST STE 200 OMAHA, NE 680224722				Phone no. (402) 330-2660

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B
(Form 990)
(Rev. January 2025)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**
▶ **Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

Name of the organization
THE SHERWOOD FOUNDATION

Employer identification number
47-0824755

Organization type (check one):

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

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

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . . ▶ $ _____

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

Name of organization
THE SHERWOOD FOUNDATION

Employer identification number
47-0824755

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	WARREN E BUFFETT 1440 KIEWIT PLAZA OMAHA, NE 68131	$ 429,330,280	☑ Person ☐ Payroll ☑ Noncash (Complete Part II for noncash contributions.)
2	ESTATE OF FRANCES YUK LIN CHUNG LIVING TRUST CO EDWARD J CHADROFF 3480 STREAMSIDE LANE 112 THOUSAND OAKS, CA 91360	$ 1,225,000	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
3	JEAN AND RANDY LAGRONE 9645 N 30TH STREET OMAHA, NE 68112	$ 12,000	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
THE SHERWOOD FOUNDATION

Employer identification number
47-0824755

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	695,122 SHS BERKSHIRE CL B	$ 285,180,752	2024-06-28

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	300,000 SHS BERKSHIRE CL B	$ 141,149,528	2024-11-25

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	6,382 SHS BERKSHIRE CL B	$ 2,984,444	2024-12-04

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

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

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

Name of organization
THE SHERWOOD FOUNDATION

Employer identification number
47-0824755

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

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

Additional Data

Return to Form

Software ID:

Software Version:

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	44,989	0		44,989

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

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
FIXED ASSETS	2005-01-01	988,334	868,976		0 %	0	0		

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

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
BUFFETT EARLY CHILDHOOD FUND	808 CONAGRA DRIVE STE 200 OMAHA, NE 68102	2023-01-26	15,082,892	SUPPORT THE BECF'S MISSION OF DEVELOPING AND SUSTAINING SELECT EARLY CHILDHOOD PROGRAMS NATIONALLY AND IN NEBRASKA.	15,082,892	NONE	03/15/24		NO NEED FOR VERIFICATION IDENTIFIED.
BUFFETT EARLY CHILDHOOD FUND	808 CONAGRA DRIVE STE 200 OMAHA, NE 68102	2023-08-01	15,062,535	SUPPORT THE BECF'S MISSION OF DEVELOPING AND SUSTAINING SELECT EARLY CHILDHOOD PROGRAMS NATIONALLY AND IN NEBRASKA.	15,062,535	NONE	03/15/24		NO NEED FOR VERIFICATION IDENTIFIED.
OKOBOJI FOUNDATION	PO BOX 593 OKOBOJI, IA 51355	2023-04-06	1,000	YOUTH IN PHILANTHROPY.	1,000	NONE	01/15/24		NO NEED FOR VERIFICATION IDENTIFIED.
BUFFETT EARLY CHILDHOOD FUND	808 CONAGRA DRIVE STE 200 OMAHA, NE 68102	2024-04-18	15,079,480	SUPPORT THE BECF'S MISSION OF DEVELOPING AND SUSTAINING SELECT EARLY CHILDHOOD PROGRAMS NATIONALLY AND IN NEBRASKA.	15,079,480	NONE	NO REPORT DUE AS OF 12/31/24		NO NEED FOR VERIFICATION IDENTIFIED.
BUFFETT EARLY CHILDHOOD FUND	808 CONAGRA DRIVE STE 200 OMAHA, NE 68102	2024-10-22	15,050,216	SUPPORT THE BECF'S MISSION OF DEVELOPING AND SUSTAINING SELECT EARLY CHILDHOOD PROGRAMS NATIONALLY AND IN NEBRASKA.	15,050,216	NONE	NO REPORT DUE AS OF 12/31/24		NO NEED FOR VERIFICATION IDENTIFIED.

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Name of Bond	End of Year Book Value	End of Year Fair Market Value
AFLAC INC ISSUE 9/16/16 MATURITY DATE	339,657	339,657
BOOKING HOLDINGS INC 3.65% 15 MAR 2025	149,665	149,665
DISCOVER BANK 4.75% 09 MAY 2025	150,260	150,260
INTERNATIONAL BUSINESS MACHINES CORP 1.7% 15 MAY 2027	140,059	140,059
UNITED HEALTH GROUP INC 2.95% 15 OCT 2027	89,019	89,019
AMAZON.COM INC 3.3% 13 APR 2027	146,394	146,394
BERKSHIRE HATHAWAY ENERGY CO 3.25% 15 APR 2028	142,789	142,789
CUMMINS INC 4.9% 20 FEB 2029	150,930	150,930
DUKE ENERGY CAROLINAS LLC	134,934	134,934
ELI LILY & CO 4.5% 09 FEB 2027	150,342	150,342
HERSHEY CO/THE 4.25%	148,568	148,568
PEPSICO SINGAPORE FINANCING I PTE LTD	99,303	99,303
SALESFORCE.COM INC 1.5%	134,778	134,778
SPDR BLOOMBERG 1-10 YEAR	317,307	317,307
WASTE MANGEMENT INC 1.15%	134,181	134,181
FISHERS LANE ASSOCIATES LLC 5.477%	508,350	508,350

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Name of Stock	End of Year Book Value	End of Year Fair Market Value
J P MORGAN CHASE & CO COM	59,208	59,208
BHP GROUP LTD ADR	24,952	24,952
LOCKHEED MARTIN CORP	45,192	45,192
HONEYWELL INTERNATIONAL INC	37,046	37,046
VISA INC	60,364	60,364
NVIDIA CORP	282,009	282,009
CAMDEN PPTY TR SH BEN INT	13,693	13,693
JOHNSON & JOHNSON	24,585	24,585
BLACKROCK INC COM	25,628	25,628
MERCK AND CO INC NEW	31,336	31,336
AMAZON COM	79,639	79,639
ACCENTURE PLC	38,345	38,345
STRYKER CORP COM	56,168	56,168
BROADRIDGE FINANCIAL SOLUTIONS	54,940	54,940
PEPSICO INC	35,126	35,126
BLACKSTONE GROUP INC COM CL A	55,002	55,002
UNITEDHEALTH GROUP INC COM	38,951	38,951
NEXTERA ENERGY INC	29,966	29,966
MICROSOFT CORP COM	61,118	61,118
LOWES COS INC COM	50,594	50,594
ZOETIS INC	37,311	37,311
APPLE INC COM	66,111	66,111
BERKSHIRE CL B	362,153,495	362,153,495
ASML HOLDING NV	33,268	33,268
CHUBB LTD	37,301	37,301
DIAMONDBACK ENERGY INC	14,089	14,089
KENVUE INC	8,903	8,903
ALPHABET INC	32,938	32,938
BROADCOM INC	67,234	67,234
CASEY'S GENERAL STORE	24,566	24,566
MOTOROLA SOLUTIONS INC	7,858	7,858
NVENT ELECTRIC PLC	58,072	58,072
VITESSE ENERGY INC	8,775	8,775
WEC ENERGY GROUP INC	11,943	11,943

TY 2024 IRS 990 e-File Render

Name:	THE SHERWOOD FOUNDATION
EIN:	47-0824755
US Government Securities - End of Year Book Value:	716,453
US Government Securities - End of Year Fair Market Value:	716,453
State & Local Government Securities - End of Year Book Value:	664,318
State & Local Government Securities - End of Year Fair Market Value:	664,318

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
WEITZ ULTRA SHORT GOVERNMENT FUND	FMV	26,284,291	26,284,291
JPMORGAN EQUITY PREMIUM INCOME ETF	FMV	49,533	49,533
LAZARD GLOBAL LISTED INFRASTRUCTURE PORTFOLIO FUND 1243	FMV	121,561	121,561

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
FIXED ASSETS	988,334	868,976	119,358	

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	128,974	0		128,974

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
PROGRAM-RELATED INVESTMENT: LAND	17,007,898	25,798,660	25,798,660
PROGRAM-RELATED INVESTMENT: BUILDINGS (NET)	7,733,673	6,842,831	6,842,831

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Description	Amount
UNREALIZED GAIN/LOSS	128,648,115
BOOK/TAX DIFFERENCE OF GRANTS PAID	40,000

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES AND MEMBERSHIPS	24,697	0		24,697
TELEPHONE & COMMUNICATIONS	27,690	0		27,690
POSTAGE	3,569	0		3,569
COPYING	1,075	0		1,075
OFFICE SUPPLIES	11,720	0		11,720
SMALL EQUIPMENT	74,190	0		74,190
BANK CHARGES	29,375	0		29,375
EQUIPMENT EXPENSE	28,946	0		28,946
INSURANCE	193,447	0		193,447
MAINTENANCE - RHLMC	1,140,649	368,705		771,944
RETIREMENT ADMIN SERVICES	1,030	0		1,030
D&O INSURANCE	9,585	0		9,585
SECURITY/SAFETY EXPENSE	35,212	0		35,212

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PRI - RENTAL INCOME	368,705	368,705	368,705

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Description	Beginning of Year - Book Value	End of Year - Book Value
AGENCY FUNDS	1,349,818	1,249,818

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTING FEES	1,799,990	0		1,799,990
INVESTMENT FEES	29,079	29,079		0
EVALUATION CONTRACTORS	1,073,792	0		1,073,792
OTHER PROFESSIONAL FEES	10,258	0		10,258
ARCHITECTURE FEES	5,990	0		5,990

TY 2024 IRS 990 e-File Render

Name: THE SHERWOOD FOUNDATION

EIN: 47-0824755

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SOCIAL SECURITY TAX	94,710	0		94,710
MEDICARE TAX	33,303	0		33,303
SUTA EXPENSE	458	0		458
FOREIGN TAXES	0	335		0
EXCISE TAXES	2,443,208	0		0