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 MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

A Employer identification number
52-1270464

Number and street (or P.O. box number if mail is not delivered to street address)
4550 MONTGOMERY AVENUE 810N

Room/suite

B Telephone number (see instructions)
(240) 752-1700

City or town, state or province, country, and ZIP or foreign postal code
BETHESDA, MD 20814

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)* ▶$ 546,085,405

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).)*

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	8,639,643	8,639,643		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	53,524,856			
	b	Gross sales price for all assets on line 6a 53,528,649				
	7	Capital gain net income (from Part IV, line 2)		53,524,856		
	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)	430,235	424,425		
	12	**Total.** Add lines 1 through 11	62,594,734	62,588,924		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	0	0		0
	14	Other employee salaries and wages	348,724	0		348,724
	15	Pension plans, employee benefits	111,969	0		111,969
	16a	Legal fees (attach schedule)	117	0		117
	b	Accounting fees (attach schedule)	75,492	0		75,492
	c	Other professional fees (attach schedule)	4,431,152	4,400,512		30,640
	17	Interest	439,641	439,641		0
	18	Taxes (attach schedule) (see instructions)	71,214	71,214		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy	139,866	0		139,866
	21	Travel, conferences, and meetings	17,094	0		17,094
	22	Printing and publications				
	23	Other expenses (attach schedule)	2,382,468	2,165,790		216,678
	24	**Total operating and administrative expenses.** Add lines 13 through 23	8,017,737	7,077,157		940,580
	25	Contributions, gifts, grants paid	24,544,887			24,544,887
	26	**Total expenses and disbursements.** Add lines 24 and 25	32,562,624	7,077,157		25,485,467
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	30,032,110			
	b	**Net investment income** (if negative, enter -0-)		55,511,767		
	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	9,637,471	35,075,519	35,075,519
	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)			
	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)	454,582,255	487,185,161	487,185,161
	14	Land, buildings, and equipment: basis ▶ 223,018			
		Less: accumulated depreciation (attach schedule) ▶	223,018	223,018	223,018
	15	Other assets (describe ▶)	17,737,031	23,601,707	23,601,707
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	482,179,775	546,085,405	546,085,405
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 ▶)	0	16,281	
	23	**Total liabilities** (add lines 17 through 22)	0	16,281	
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	482,179,775	546,069,124	
	29	**Total net assets or fund balances** (see instructions)	482,179,775	546,069,124	
	30	**Total liabilities and net assets/fund balances** (see instructions)	482,179,775	546,085,405	

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	482,179,775
2	Enter amount from Part I, line 27a	2	30,032,110
3	Other increases not included in line 2 (itemize) ▶	3	33,857,239
4	Add lines 1, 2, and 3	4	546,069,124
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	546,069,124

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	FROM PASSTHROUGH ENTITIES	P		
b	FROM PASSTHROUGH ENTITIES	P		
c	PUBLICLY TRADED SECURITIES	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	1,650,978			1,650,978
b	51,856,198			51,856,198
c	21,473		3,793	17,680
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				1,650,978
b				51,856,198
c				17,680
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	53,524,856
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	771,614
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	771,614
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	771,614
6	Credits/Payments:				
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	533,148		
b	Exempt foreign organizations—tax withheld at source	6b	0		
c	Tax paid with application for extension of time to file (Form 8868)	6c	325,000		
d	Backup withholding erroneously withheld	6d	0		
7	Total credits and payments. Add lines 6a through 6d	7	858,148		
8	Enter any **penalty** for underpayment of estimated tax. Check here ☑ if Form 2220 is attached.	8	392		
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	86,142		
11	Enter the amount of line 10 to be: **Credited to 2025 estimated tax** ▶ 86,142 **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) ▶ DC, MD, DE			
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?	13	Yes	

Website address ▶ N/A

14 The books are in care of ▶ TAXPAYER Telephone no. ▶ (240) 752-1700

Located at ▶ 4550 MONTGOMERY AVENUE 810N BETHESDA MD ZIP+4 ▶ 20814

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 |

			Yes	No
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?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a During the year did the foundation (either directly or indirectly):			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)		No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)		No
(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		No
c Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
d Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2024?	1d		No
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a At the end of tax year 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024?	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)*

		Line	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? *If "Yes," attach the statement required by Regulations section 53.4945–5(d).*	5d	Yes	
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
SUSAN R GELMAN 4550 MONTGOMERY AVENUE 810N BETHESDA, MD 20814	DIRECTOR/PRESIDENT 5.00	0	0	0
MICHAEL C GELMAN 4550 MONTGOMERY AVENUE 810N BETHESDA, MD 20814	DIRECTOR/V.P./TREAS./SEC. 20.00	0	44,097	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
ADINA BARKINSKIY 4550 MONTGOMERY AVENUE 810N BETHESDA,MD 20814	DIRECTOR OF PROGRAMS 30.00	149,785	30,717	0
LISA JACOBSON 4550 MONTGOMERY AVENUE 810N BETHESDA,MD 20814	SR. PROGRAM OFFICER 40.00	116,667	11,928	0
GAIL HYMAN 4550 MONTGOMERY AVENUE 810N BETHESDA,MD 20814	GRANTS ADMINISTRATOR 34.00	61,138	1,834	0

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

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
CRESTVIEW MANAGEMENT LLC 4550 MONTGOMERY AVE 810N BETHESDA,MD 20814	INVESTMENT ADVISORY	4,398,012

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 MARYLAND HILLEL7612 MOWATT LANECOLLEGE PARK, MD 20740	7,700,000
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 . . . . ▶	7,700,000

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	341,335,327
b	Average of monthly cash balances		1b	10,913,137
c	Fair market value of all other assets (see instructions)		1c	129,548,380
d	**Total** (add lines 1a, b, and c)		1d	481,796,844
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	481,796,844
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)		4	7,226,953
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3		5	474,569,891
6	**Minimum investment return.** Enter 5% (0.05) of line 5		6	23,728,495

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	23,728,495
2a	Tax on investment income for 2024 from Part V, line 5	2a 771,614		
b	Income tax for 2024. (This does not include the tax from Part V.)	2b 42,616		
c	Add lines 2a and 2b		2c	814,230
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	22,914,265
4	Recoveries of amounts treated as qualifying distributions		4	1,835,324
5	Add lines 3 and 4		5	24,749,589
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	24,749,589

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	25,485,467
b	Program-related investments—total from Part VIII-B	1b	7,700,000
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	33,185,467

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				24,749,589
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.			6,515,987	
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: ▶ $ 33,185,467				
a Applied to 2023, but not more than line 2a			6,515,987	
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				24,749,589
e Remaining amount distributed out of corpus	1,919,891			
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	1,919,891			
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	1,919,891			
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 1,919,891				

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			
	(a) 2024	**(b)** 2023	**(c)** 2022	**(d)** 2021	**(e) Total**
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).)

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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 Supplementary Information (continued)

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

Recipient 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*				
70 FACES MEDIA 520 8TH AVE 4TH FLOOR NEW YORK,NY 10018	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
ACLU FOUNDATION 125 BROAD ST 18TH FLOOR NEW YORK,NY 10004	NONE	PC	GENERAL CHARITABLE PURPOSES	250,000
ACLU OF THE DISTRICT OF COLUMBIA 915 15TH STREET NW WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
ADAMAH INC 25 BROADWAY SUITE 1700 NEW YORK,NY 10004	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
ADAS ISRAEL CONGREGATION 2850 QUEBEC STREET NW WASHINGTON,DC 20008	NONE	PC	GENERAL CHARITABLE PURPOSES	80,000
AFFORDABLE HOMES AND COMMUNITIES 2230 N FAIRFAX DRIVE ARLINGTON,VA 22201	NONE	PC	GENERAL CHARITABLE PURPOSES	6,364
ALLIANCE FOR MIDDLE EAST PEACE 1725 I ST NW SUITE 300 WASHINGTON,DC 20006	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
AMERICA VOTES EDUCATION FUND 1155 CONNECTICUT AVE NW SUITE 600 WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	500,000
AMERICAN FRIENDS MUSEUM OF THE JEWISH PEOPLE 633 3RD AVENUE NEW YORK,NY 10017	NONE	PC	GENERAL CHARITABLE PURPOSES	800
AMERICAN FRIENDS OF THE HEBREW UNIVERSITY ELISSA FISHMAN AFHU CEO 199 WATER ST 11TH FLOOR NEW YORK,NY 10038	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
AMERICAN UNIVERSITY HILLEL KAY SPIRITUAL LIFE CENTER 4400 MASSACHUSETTS AVE NW WASHINGTON,DC 200168010	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
AMERICANS UNITED FOR SEPARATION OF CHURCH AND STATE 1310 L STREET NW SUITE 200 WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	75,000
ANACOSTIA WATERSHED SOCIETY THE GEORGE WASHINGTON HOUSE 4302 BALTIMORE AVENUE BLADENSBURG,MD 207101031	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
ANTI-DEFAMATION LEAGUE 605 THIRD AVE NEW YORK,NY 10158	NONE	PC	GENERAL CHARITABLE PURPOSES	300,000
ARCADIA CENTER FOR SUSTAINABLE FOOD AND AGRICULTURE 9000 RICHMOND HIGHWAY ALEXANDRIA,VA 22309	NONE	PC	GENERAL CHARITABLE PURPOSES	40,000
AVALON THEATRE PROJECT 5612 CONNECTICUT AVENUE NW WASHINGTON,DC 20015	NONE	PC	GENERAL CHARITABLE PURPOSES	2,500
AVODAH 195 MONTAGUE ST FLOOR 14 BROOKLYN,NY 11201	NONE	PC	GENERAL CHARITABLE PURPOSES	30,000
AYUDA 1990 K STREET NW SUITE 500 WASHINGTON,DC 20006	NONE	PC	GENERAL CHARITABLE PURPOSES	40,000
BAY STREET THEATER 1 LONG WHARF SAG HARBOR,NY 11963	NONE	PC	GENERAL CHARITABLE PURPOSES	2,500
BENDER JCC OF GREATER WASHINGTON 6125 MONTROSE ROAD ROCKVILLE,MD 208524857	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
BIRTHRIGHT ISRAEL FOUNDATION 711 THIRD AVE 10TH FLOOR NEW YORK,NY 10017	NONE	PC	GENERAL CHARITABLE PURPOSES	300,000
BIRTHRIGHT ISRAEL FOUNDATION 711 THIRD AVE 10TH FLOOR NEW YORK,NY 10017	NONE	PC	GENERAL CHARITABLE PURPOSES	36,000
BRANDEIS UNIVERSITY 415 SOUTH STREET MS 100 WALTHAM,MA 02453	NONE	PC	GENERAL CHARITABLE PURPOSES	110,000
BREAD FOR THE CITY 1525 SEVENTH STREET NW WASHINGTON,DC 200013201	NONE	PC	GENERAL CHARITABLE PURPOSES	45,000
C&O CANAL TRUST 142 W POTOMAC STREET WILLIAMSPORT,MD 21795	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
CAPITAL AREA FOOD BANK 4900 PUERTO RICO AVENUE NE WASHINGTON,DC 20017	NONE	PC	GENERAL CHARITABLE PURPOSES	700,000
CAPITAL AREA FOOD BANK 4900 PUERTO RICO AVENUE NE WASHINGTON,DC 20017	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
CAPITAL CAMPS & RETREAT CENTER 11300 ROCKVILLE PIKE SUITE 407 ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
CAPITAL IMPACT PARTNERS 1400 CRYSTAL DRIVE SUITE 500 ARLINGTON,VA 22202	NONE	PC	GENERAL CHARITABLE PURPOSES	315,000
CAPITAL JEWISH MUSEUM 1319 F STREET NW SUITE 810 WASHINGTON,DC 200041106	NONE	PC	GENERAL CHARITABLE PURPOSES	1,000
CAPITAL JEWISH MUSEUM 1319 F STREET NW SUITE 810 WASHINGTON,DC 200041106	NONE	PC	GENERAL CHARITABLE PURPOSES	4,000
CAPITAL JEWISH MUSEUM 1319 F STREET NW SUITE 810 WASHINGTON,DC 200041106	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
CENTER FOR CREATIVE CHANGE 4115 WISCONSIN AVENUE NW SUITE 10 WASHINGTON,DC 20016	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
CENTER FOR REPRODUCTIVE RIGHTS 199 WATER STREET NEW YORK,NY 10038	NONE	PC	GENERAL CHARITABLE PURPOSES	75,000
CHABAD OF TRIBECA CHABAD OF TRIBECA/SOHO 291 BROADWAY MEZZANINE NEW YORK,NY 10007	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
CHESAPEAKE BAY FOUNDATION PHILIP MERRILL ENVIRONMENTAL CENTER 6 HERNDON AVENUE ANNAPOLIS,MD 21403	NONE	PC	GENERAL CHARITABLE PURPOSES	200,000
CHESAPEAKE BAY FOUNDATION PHILIP MERRILL ENVIRONMENTAL CENTER 6 HERNDON AVENUE ANNAPOLIS,MD 21403	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
CHILDREN'S NATIONAL HOSPITAL 1 INVENTA PLACE 6TH FLOOR SILVER SPRING,MD 20910	NONE	PC	GENERAL CHARITABLE PURPOSES	120,000
CITYTUTOR DC 641 S STREET NW 300 WASHINGTON,DC 20001	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
CIVIC NATION WHEN WE ALL VOTE 1025 VERMONT AVENUE NW SUITE 1120 WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000,000
CONGRESS HEIGHTS COMMUNITY TRAINING & DEVELOPMENT CORP 3215 MARTIN LUTHER KING JR AVE SE WASHINGTON,DC 20020	NONE	PC	GENERAL CHARITABLE PURPOSES	105,000
DC ACTION 1400 16TH ST NW SUITE 740 WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
DC CENTRAL KITCHEN 2121 FIRST STREET SW WASHINGTON,DC 20024	NONE	PC	GENERAL CHARITABLE PURPOSES	79,000
DC CENTRAL KITCHEN 2121 FIRST STREET SW WASHINGTON,DC 20024	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
DC CENTRAL KITCHEN 2121 FIRST STREET SW WASHINGTON,DC 20024	NONE	PC	GENERAL CHARITABLE PURPOSES	107,000
DC CENTRAL KITCHEN 2121 FIRST STREET SW WASHINGTON,DC 20024	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
DC CENTRAL KITCHEN 2121 FIRST STREET SW WASHINGTON,DC 20024	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
DC SCORES 1140 CONNECTICUT AVE NW SUITE 1200 WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
DUMBARTON ARTS & EDUCATION 3133 DUMBARTON STREET NW WASHINGTON,DC 20007	NONE	PC	GENERAL CHARITABLE PURPOSES	30,000
ECO CITY FARMS 6010 TAYLOR ROAD RIVERDALE,MD 20737	NONE	PC	GENERAL CHARITABLE PURPOSES	18,432
EDLAVITCH JCC OF WASHINGTON DC 1529 16TH STREET NW WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
EMMA'S TORCH 2212 RHODE ISLAND AVE NE WASHINGTON,DC 20018	NONE	PC	GENERAL CHARITABLE PURPOSES	93,060
ENCOUNTER 1 WEST 4TH STREET NEW YORK,NY 10012	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
EPACENTER 1950 BAY ROAD EAST PALO ALTO,CA 94303	NONE	PC	GENERAL CHARITABLE PURPOSES	7,500
FAIR CHANCE 1775 EYE STREET NW SUITE 1150 WASHINGTON,DC 20006	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
FEED THE FRIDGE PO BOX 31123 BETHESDA,MD 20824	NONE	PC	GENERAL CHARITABLE PURPOSES	26,600
FLORENCE IMMIGRANT AND REFUGEE RIGHTS PROJECT PO BOX 86299 TUSCAN,AZ 85754	NONE	PC	GENERAL CHARITABLE PURPOSES	125,000
FOOD AND FRIENDS 219 RIGGS ROAD NE WASHINGTON,DC 20011	NONE	PC	GENERAL CHARITABLE PURPOSES	90,000
FOOD FOR ALL DC 1810 16TH STREET NW WASHINGTON,DC 20009	NONE	PC	GENERAL CHARITABLE PURPOSES	6,300
FOOD RESEARCH AND ACTION CENTER 1200 18TH ST NW SUITE 400 WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
FOUNDATION FOR JEWISH CAMP 253 WEST 35TH STREET 4TH FLOOR NEW YORK,NY 10001	NONE	PC	GENERAL CHARITABLE PURPOSES	75,000
FRESHFARM MARKETS 1100 15TH STREET NW WEWORK 4TH FLOOR WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	95,000
FWDUS EDUCATION FUND INC 701 8TH STREET NW SUITE 800 WASHINGTON,DC 20001	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
GALLAUDET HILLEL ELY CENTER 117 800 FLORIDA AVE NE WASHINGTON,DC 20002	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
GATHER INC 1817 M STREET NW WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	187,500
GATHER INC 1817 M STREET NW WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	187,500
GATHER INC 1817 M STREET NW WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	187,500
GATHER INC 1817 M STREET NW WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
GATHER INC 1817 M STREET NW WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	87,500
GATHER INC 1817 M STREET NW WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
GEORGE MASON UNIVERSITY HILLEL 4400 UNIVERSITY DRIVE MSN 2C7 JOHNSON CENTER RM 239H FAIRFAX,VA 22030	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
GESHER - THE BRIDGE SHUL (THE CONSERVATIVE SYNAGOGUE OF THE HAMPTONS) PO BOX 1196 BRIDGEHAMPTON,NY 11932	NONE	PC	GENERAL CHARITABLE PURPOSES	1,800
GIFFORDS LAW CENTER TO PREVENT GUN VIOLENCE 268 BUSH STREET 555 SAN FRANCISCO,CA 94104	NONE	PC	GENERAL CHARITABLE PURPOSES	35,000
GIVING GROUP COMMUNITY 500 COMMERCIAL STREET SUITE 4R BOSTON,MA 02109	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
GLAAD 104 WEST 29TH STREET 4TH FLOOR NEW YORK,NY 10001	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
GLOBAL IMPACT 1199 N FAIRFAX ST SUITE 300 ALEXANDRIA,VA 22314	NONE	PC	GENERAL CHARITABLE PURPOSES	125,000
GLSEN 244 MADISON AVE 108 NEW YORK,NY 10016	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
GREATER MIAMI JEWISH FEDERATION 4200 BISCAYNE BLVD MIAMI,FL 33137	NONE	PC	GENERAL CHARITABLE PURPOSES	1,800
GUILD HALL 158 MAIN STREET EAST HAMPTON,NY 11937	NONE	PC	GENERAL CHARITABLE PURPOSES	7,500
HAMPTONS INTERNATIONAL FILM FESTIVAL 79 NEWTOWN LANE EAST HAMPTON,NY 11937	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
HEBREW HOME OF GREATER WASHINGTON 6121 MONTROSE ROAD ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	35,000
HIGHER ACHIEVEMENT DC METRO 317 8TH STREET NE WASHINGTON,DC 20002	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
HILLEL AT THE GEORGE WASHINGTON UNIVERSITY 2300 H STREET NW WASHINGTON,DC 20037	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
HILLEL INTERNATIONAL 800 8TH STREET NW WASHINGTON,DC 20001	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
HILLEL INTERNATIONAL 800 8TH STREET NW WASHINGTON,DC 20001	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
HONEYMOON ISRAEL 2406 MOUNT VERNON RD SUITE 130 DUNWOODY,GA 30338	NONE	PC	GENERAL CHARITABLE PURPOSES	30,000
HOPEWELL FUND PO BOX 38068 BALTIMORE,MD 212978068	NONE	PC	GENERAL CHARITABLE PURPOSES	500,000
HORTON'S KIDS 2233 HUNTER PLACE SE WASHINGTON,DC 20020	NONE	PC	GENERAL CHARITABLE PURPOSES	45,000
HUGHES UNITED METHODIST 10700 GEORGIA AVE WHEATON,MD 20902	NONE	PC	GENERAL CHARITABLE PURPOSES	69,720
HUMAN RIGHTS CAMPAIGN FOUNDATION 1640 RHODE ISLAND AVE NW WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	150,000
INFORMING DEMOCRACY 1030 15TH STREET NW SUITE 950 WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	250,000
INSTITUTE FOR PUBLIC HEALTH INNOVATION 1250 CONNECTICUT AVE NW SUITE 202 WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	160,000
ISRAEL ON CAMPUS COALITION 1100 17TH STREET NW SUITE 700 WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
ISRAEL POLICY FORUM 122 E 42ND STREET SUITE 3505 NEW YORK,NY 10168	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
ISRAEL POLICY FORUM 122 E 42ND STREET SUITE 3505 NEW YORK,NY 10168	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
ISRAEL POLICY FORUM 122 E 42ND STREET SUITE 3505 NEW YORK,NY 10168	NONE	PC	GENERAL CHARITABLE PURPOSES	500,000
JEWISH COALITION AGAINST DOMESTIC ABUSE PO BOX 2266 ROCKVILLE,MD 20847	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
JEWISH COMMUNITY RELATIONS COUNCIL OF GREATER WASHINGTON 6101 EXECUTIVE BLVD SUITE 300 ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	60,000
JEWISH COMMUNITY RELATIONS COUNCIL OF GREATER WASHINGTON 6101 EXECUTIVE BLVD SUITE 300 ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	30,000
JEWISH COUNCIL FOR THE AGING 12320 PARKLAWN DRIVE ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
JEWISH FEDERATION OF GREATER WASHINGTON 6101 EXECUTIVE BLVD ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	500,000
JEWISH FEDERATION OF GREATER WASHINGTON 6101 EXECUTIVE BLVD ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
JEWISH FEDERATION OF GREATER WASHINGTON 6101 EXECUTIVE BLVD ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	1,000,000
JEWISH FEDERATION OF GREATER WASHINGTON 6101 EXECUTIVE BLVD ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
JEWISH FEDERATION OF GREATER WASHINGTON 6101 EXECUTIVE BLVD ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	750,000
JEWISH FUNDERS NETWORK 150 WEST 30TH STREET SUITE 900 NEW YORK,NY 10001	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
JEWISH FUNDERS NETWORK 150 WEST 30TH STREET SUITE 900 NEW YORK,NY 10001	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
JEWISH SOCIAL SERVICE AGENCY 200 WOOD HILL ROAD ROCKVILLE,MD 20850	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
JFN 150 W 30TH STREET SUITE 900 NEW YORK,NY 10001	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
JFN 150 W 30TH STREET SUITE 900 NEW YORK,NY 10001	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
JOINT DISTRIBUTION COMMITTEE 220 E 42ND ST SUITE 400 NEW YORK,NY 10017	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
KEEP TAHOE BLUE 2877 LAKE TAHOE BOULEVARD SOUTH LAKE TAHOE,CA 96150	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
KESHET 1860 WASHINGTON STREET NEWTON,MA 02466	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
KID POWER INC 400 E STREET SW WASHINGTON,DC 20024	NONE	PC	GENERAL CHARITABLE PURPOSES	35,000
KIDS IN NEED OF DEFENSE 1201 L STREET NW 2ND FLOOR WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	200,000
LA CLINICA DEL PUEBLO 2831 15TH STREET NW WASHINGTON,DC 20009	NONE	PC	GENERAL CHARITABLE PURPOSES	65,000
LEHRHAUS 425 WASHINGTON STREET SOMERVILLE,MA 02143	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
LIFE PIECES TO MASTERPIECES 5600 EADS ST NE 4TH FLOOR WASHINGTON,DC 20019	NONE	PC	GENERAL CHARITABLE PURPOSES	35,000
LIFT-DC 999 N CAPITOL ST NE SUITE 310 WASHINGTON,DC 20002	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
M SQUARED 261 MADISON AVE 9TH FLOOR NEW YORK,NY 10016	NONE	PC	GENERAL CHARITABLE PURPOSES	56,750
MAKOM (JEWISH FOUNDATION FOR GROUP HOMES) 1500 EAST JEFFERSON STREET ROCKVILLE,MD 20852	NONE	PC	GENERAL CHARITABLE PURPOSES	30,000
MANNA FOOD CENTER 12301 OLD COLUMBIA PIKE SUITE 200 SILVER SPRING,MD 20906	NONE	PC	GENERAL CHARITABLE PURPOSES	122,568
MANNA FOOD CENTER 12301 OLD COLUMBIA PIKE SUITE 200 SILVER SPRING,MD 20906	NONE	PC	GENERAL CHARITABLE PURPOSES	29,749
MARYLAND HILLEL 7612 MOWATT LANE COLLEGE PARK,MD 20740	NONE	PC	GENERAL CHARITABLE PURPOSES	40,000
MARY'S CENTER 2333 ONTARIO ROAD NW WASHINGTON,DC 20009	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
MARY'S CENTER 2333 ONTARIO ROAD NW WASHINGTON,DC 20009	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
MEM GLOBAL (MOISHE HOUSE) 5802 MONROE RD CHARLOTTE,NC 28212	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
MEM GLOBAL (MOISHE HOUSE) 5802 MONROE RD CHARLOTTE,NC 28212	NONE	PC	GENERAL CHARITABLE PURPOSES	35,000
MIRIAM'S KITCHEN 2401 VIRGINIA AVENUE NW WASHINGTON,DC 20037	NONE	PC	GENERAL CHARITABLE PURPOSES	75,000
MONTGOMERY COUNTY FOOD COUNCIL PO BOX 34412 BETHESDA,MD 20827	NONE	PC	GENERAL CHARITABLE PURPOSES	75,000
MOVING FORWARD CONTEMPORARY ASIAN AMERICAN DANCE COMPANY 2745 ARIZONA AVENUE NW WASHINGTON,DC 20016	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
NATIONAL COUNCIL OF JEWISH WOMEN 2055 L STREET NW SUITE 650 WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
NATIONAL COUNCIL OF JEWISH WOMEN 2055 L STREET NW SUITE 650 WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
NATIONAL GALLERY OF ART 2000B SOUTH CLUB DRIVE LANDOVER,MD 20785	NONE	PC	GENERAL CHARITABLE PURPOSES	1,500
NATIONAL PARTNERSHIP FOR WOMEN & FAMILIES 1725 EYE STREET NW SUITE 950 WASHINGTON,DC 20006	NONE	PC	GENERAL CHARITABLE PURPOSES	60,000
NATIONAL WOMEN'S LAW CENTER 1350 I STREET NW SUITE 700 WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	30,000
NATIONALS PHILANTHROPIES 1500 SOUTH CAPITOL STREET SE WASHINGTON,DC 20003	NONE	PC	GENERAL CHARITABLE PURPOSES	60,000
NATURAL RESOURCES DEFENSE COUNCIL 40 WEST 20TH STREET NEW YORK,NY 10011	NONE	PC	GENERAL CHARITABLE PURPOSES	500,000
NECHAMA - JEWISH RESPONSE TO DISASTER PO BOX 17249 ST PAUL,MN 55117	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
NEW ISRAEL FUND AVISHAI PORAT HACOHEN DUBNOV 22 D TEL AVIV 6436914 IS	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
NEW VENTURE FUND 1828 L ST NW WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
NIF PO BOX 52113 JERUSALEM 9152101 IS	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
NIF PO BOX 52113 JERUSALEM 9152101 IS	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
ONE WORLD EDUCATION 2607 24TH STREET NW SUITE 1 AND 2 WASHINGTON,DC 20008	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
ONETABLE 228 PARK AVE SOUTH SUITE 77191 NEW YORK,NY 10003	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
OUR AMERICAN FUTURE FOUNDATION PO BOX 34491 WASHINGTON,DC 20043	NONE	PC	GENERAL CHARITABLE PURPOSES	500,000
OUR AMERICAN FUTURE FOUNDATION PO BOX 34491 WASHINGTON,DC 20043	NONE	PC	GENERAL CHARITABLE PURPOSES	500,000
PEF ISRAEL ENDOWMENT FUNDS 630 THIRD AVE RM 1500 NEW YORK,NY 10017	NONE	PC	GENERAL CHARITABLE PURPOSES	125,000
PLANNED PARENTHOOD OF METROPOLITAN WASHINGTON 1225 4TH STREET NE WASHINGTON,DC 20002	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
PLANNED PARENTHOOD OF METROPOLITAN WASHINGTON 1225 4TH STREET NE WASHINGTON,DC 20002	NONE	PC	GENERAL CHARITABLE PURPOSES	200,000
POZEZ JEWISH COMMUNITY CENTER OF NORTHERN VIRGINIA 8900 LITTLE RIVER TURNPIKE FAIRFAX,VA 22031	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
PROJECT UNLOADED 1 E ERIE ST SUITE 525-4787 CHICAGO,DC 60611	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
RED TENT FUND 2020 PENNSYLVANIA AVE NW WASHINGTON,DC 20006	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
RED WINE & BLUE EDUCATION FUND 15830 S PARK BLVD SHAKER HEIGHTS,OH 44120	NONE	PC	GENERAL CHARITABLE PURPOSES	200,000
ROUND HOUSE THEATRE SILVER SPRING CIVIC BUILDING ONE VETERANS PLACE SILVER SPRING,MD 20910	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
SB WORKS 2316 RHODE ISLAND AVE NE WASHINGTON,DC 20018	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
SHAKESPEARE THEATRE COMPANY 516 EIGHTH STREET SE WASHINGTON,DC 200032834	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
SHALOM HARTMAN INSTITUTE OF NORTH AMERICA 475 RIVERSIDE DRIVE SUITE 1450 NEW YORK,NY 10115	NONE	PC	GENERAL CHARITABLE PURPOSES	125,000
SHARE OUR STRENGTH 1030 15TH STREET NW SUITE 1100W WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
SHARSHERET 1086 TEANECK ROAD SUITE 2G TEANECK,NJ 07666	NONE	PC	GENERAL CHARITABLE PURPOSES	2,500
SIERRA CLUB FOUNDATION 2101 WEBSTER STREET SUITE 1250 OAKLAND,CA 94612	NONE	PC	GENERAL CHARITABLE PURPOSES	350,000
SITAR ARTS CENTER 1700 KALORAMA ROAD NW SUITE 101 WASHINGTON,DC 20009	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
SIXTH & I 600 I STREET NW WASHINGTON,DC 20001	NONE	PC	GENERAL CHARITABLE PURPOSES	7,500
SIXTH & I 600 I STREET NW WASHINGTON,DC 20001	NONE	PC	GENERAL CHARITABLE PURPOSES	75,000
SLINGSHOT 445 PARK AVE SUITE 16A NEW YORK,NY 10022	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
SMALL THINGS MATTER 14516 BAUER DRIVE ROCKVILLE,MD 20853	NONE	PC	GENERAL CHARITABLE PURPOSES	74,725
SO WHAT ELSE 6901 ROCKLEDGE DR SUITE 709 BETHESDA,MD 20817	NONE	PC	GENERAL CHARITABLE PURPOSES	75,000
SOWING EMPOWERMENT & ECONOMIC DEVELOPMENT INC 6201 RIVERDALE ROAD SUITE 200 RIVERDALE,MD 20737	NONE	PC	GENERAL CHARITABLE PURPOSES	13,300
STATE DEMOCRACY DEFENDERS FUND 600 PENNSYLVANIA AVE SE 15180 WASHINGTON,DC 20003	NONE	PC	GENERAL CHARITABLE PURPOSES	100,000
STERN GROVE FESTIVAL ASSOCIATION 832 FOLSOM STREET SUITE 1000 SAN FRANCISCO,CA 94107	NONE	PC	GENERAL CHARITABLE PURPOSES	2,500
STUDENT CONSERVATION ASSOCIATION 1310 N COURTHOUSE RD SUITE 110 ARLINGTON,VA 22201	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
STUDIO THEATRE 1501 14TH STREET NW WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
SUNFLOWER BAKERY 5951 HALPINE RD ROCKVILLE,MD 20851	NONE	PC	GENERAL CHARITABLE PURPOSES	60,000
TARGET ALS FOUNDATION 244 MADISON AVE 1025 NEW YORK,NY 10016	NONE	PC	GENERAL CHARITABLE PURPOSES	200,000
TERP FARM 7093 PREINKERT DR COLLEGE PARK,MD 20740	NONE	PC	GENERAL CHARITABLE PURPOSES	90,000
THE AMERICAN FRIENDS OF THE LUDWIG FOUNDATION OF CUBA 4 W 43RD STREET SUITE 304 NEW YORK,NY 10036	NONE	PC	GENERAL CHARITABLE PURPOSES	1,600
THE DEN COLLECTIVE 8215 OLD GEORGETOWN ROAD BETHESDA,MD 20814	NONE	PC	GENERAL CHARITABLE PURPOSES	17,000
THE DEN COLLECTIVE 8215 OLD GEORGETOWN ROAD BETHESDA,MD 20814	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
THE JOHNS HOPKINS CENTER FOR GUN VIOLENCE SOLUTIONS 615 N WOLFE STREET E2132 BALTIMORE,MD 212052179	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
THE KENNEDY CENTER 2700 F STREET NW WASHINGTON,DC 20566	NONE	PC	GENERAL CHARITABLE PURPOSES	5,521
THE KENNEDY CENTER 2700 F STREET NW WASHINGTON,DC 20566	NONE	PC	GENERAL CHARITABLE PURPOSES	25,000
THE MARCH FORTH FOUNDATION 333 WEST 14TH STREET 5TH FLOOR NEW YORK,NY 10014	NONE	PF	GENERAL CHARITABLE PURPOSES	30,000
THE MARCH FORTH FOUNDATION 333 WEST 14TH STREET 5TH FLOOR NEW YORK,NY 10014	NONE	PF	GENERAL CHARITABLE PURPOSES	590,000
THE MARCH FORTH FOUNDATION 333 WEST 14TH STREET 5TH FLOOR NEW YORK,NY 10014	NONE	PF	GENERAL CHARITABLE PURPOSES	275,000
THE PHILLIPS COLLECTION 1600 21ST STREET NW WASHINGTON,DC 200091090	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
THE PLATFORM OF HOPE A PROJECT OF SOCIAL GOOD FUND 1640 COLUMBIA RD NW WASHINGTON,DC 20009	NONE	PC	GENERAL CHARITABLE PURPOSES	50,000
THE SARAH AND DANIEL RUEVEN FOUNDATION INC 250 WEST STREET 9JK NEW YORK,NY 10013	NONE	PF	GENERAL CHARITABLE PURPOSES	5,000
THE SARAH AND DANIEL RUEVEN FOUNDATION INC 250 WEST STREET 9JK NEW YORK,NY 10013	NONE	PF	GENERAL CHARITABLE PURPOSES	10,000
THE SARAH AND DANIEL RUEVEN FOUNDATION INC 250 WEST STREET 9JK NEW YORK,NY 10013	NONE	PF	GENERAL CHARITABLE PURPOSES	557,500
THE SARAH AND DANIEL RUEVEN FOUNDATION INC 250 WEST STREET 9JK NEW YORK,NY 10013	NONE	PF	GENERAL CHARITABLE PURPOSES	100,000
THE SARAH AND DANIEL RUEVEN FOUNDATION INC 250 WEST STREET 9JK NEW YORK,NY 10013	NONE	PF	GENERAL CHARITABLE PURPOSES	10,000
THE SARAH AND DANIEL RUEVEN FOUNDATION INC 250 WEST STREET 9JK NEW YORK,NY 10013	NONE	PF	GENERAL CHARITABLE PURPOSES	703,000
THE SARAH AND DANIEL RUEVEN FOUNDATION INC 250 WEST STREET 9JK NEWYORK,NY 10013	NONE	PF	GENERAL CHARITABLE PURPOSES	30,000
THE SARAH AND DANIEL RUEVEN FOUNDATION INC 250 WEST STREET 9JK NEW YORK,NY 10013	NONE	PF	GENERAL CHARITABLE PURPOSES	37,000
THE SARAH AND DANIEL RUEVEN FOUNDATION INC 250 WEST STREET 9JK NEW YORK,NY 10013	NONE	PF	GENERAL CHARITABLE PURPOSES	47,500
THE STORE AT GEORGE WASHINGTON UNIVERSITY UNIVERSITY STUDENT CENTER SUITE 204 800 21ST STREET NW WASHINGTON,DC 20052	NONE	PC	GENERAL CHARITABLE PURPOSES	8,000
THE TREVOR PROJECT PO BOX 69232 WEST HOLLYWOOD,CA 90069	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
THE WASHINGTON INSTITUTE FOR NEAR EAST POLICY 1111 19TH STREET NW SUITE 500 WASHINGTON,DC 20036	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
TRUE GROUND HOUSING PARTNERS 4318 N CARLIN SPRINGS ROAD ARLINGTON,VA 22203	NONE	PC	GENERAL CHARITABLE PURPOSES	7,298
UNITED STATES HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON,DC 20024	NONE	PC	GENERAL CHARITABLE PURPOSES	200,000
UPCOUNTY HUB 12900 MIDDLEBROOK ROAD SUITE 1100 GERMANTOWN,MD 20874	NONE	PC	GENERAL CHARITABLE PURPOSES	75,000
VIOLENCE POLICY CENTER 805 15TH ST NW SUITE 601 WASHINGTON,DC 20005	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
WASHINGTON BALLET 3515 WISCONSIN AVENUE NW WASHINGTON,DC 20016	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
WASHINGTON HEBREW CONGREGATION 3935 MACOMB ST NW WASHINGTON,DC 200163741	NONE	PC	GENERAL CHARITABLE PURPOSES	5,000
WASHINGTON HEBREW CONGREGATION 3935 MACOMB ST NW WASHINGTON,DC 200163741	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
WILDERNESS LEADERSHIP & LEARNING INC 1758 PARK ROAD NW WASHINGTON,DC 200102105	NONE	PC	GENERAL CHARITABLE PURPOSES	15,000
WOMEN'S ART CENTER OF THE HAMPTONS INC 595 SPRINGS FIREPLACE ROAD EAST HAMPTON,NY 11937	NONE	PC	GENERAL CHARITABLE PURPOSES	2,500
YOSEMITE CONSERVANCY 101 MONTGOMERY STREET SUITE 2450 SAN FRANCISCO,CA 94104	NONE	PC	GENERAL CHARITABLE PURPOSES	10,000
YOUNG PLAYWRIGHTS' THEATER 6925 WILLOW STREET NW SUITE LL-230 WASHINGTON,DC 20012	NONE	PC	GENERAL CHARITABLE PURPOSES	20,000
Total . . . . ▶ 3a				24,544,887
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					
4 Dividends and interest from securities			14	8,639,643	
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			14	430,235	
8 Gain or (loss) from sales of assets other than inventory			18	53,524,856	
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		62,594,734	0

13 **Total.** Add line 12, columns (b), (d), and (e). 13 62,594,734

(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	Title
	2025-11-04	

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
RACHEL CALDWELL				P01274062

Firm's name ▶ ANDERSEN TAX LLC — Firm's EIN ▶33-1197384

Firm's address ▶ 333 BUSH STREET SUITE 1700
SAN FRANCISCO, CA 94104 — Phone no. (415) 764-2700

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 MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	75,492	0		75,492

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION
EIN: 52-1270464

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
THE SARAH AND DANIEL RUEVEN FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-06-11	100,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	100,000	NONE	12/31/2024		THE SARAH AND DANIEL RUEVEN FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE SARAH AND DANIEL RUEVEN FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-07-09	10,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	10,000	NONE	12/31/2024		THE SARAH AND DANIEL RUEVEN FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE SARAH AND DANIEL RUEVEN FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-09-30	703,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	703,000	NONE	12/31/2024		THE SARAH AND DANIEL RUEVEN FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE SARAH AND DANIEL RUEVEN FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-10-10	30,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	30,000	NONE	12/31/2024		THE SARAH AND DANIEL RUEVEN FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE SARAH AND DANIEL RUEVEN FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-12-04	37,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	37,000	NONE	12/31/2024		THE SARAH AND DANIEL RUEVEN FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE SARAH AND DANIEL RUEVEN FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-12-19	47,500	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	47,500	NONE	12/31/2024		THE SARAH AND DANIEL RUEVEN FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE MARCH FORTH FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-07-26	30,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE MARCH FORTH FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	30,000	NONE	12/31/2024		THE MARCH FORTH FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE MARCH FORTH FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-11-14	590,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE MARCH FORTH FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	590,000	NONE	12/31/2024		THE MARCH FORTH FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE MARCH FORTH FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-12-12	275,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE MARCH FORTH FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	275,000	NONE	12/31/2024		THE MARCH FORTH FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING

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
									THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
JEWISH FEDERATION OF GREATER WASHINGTON	6101 EXECUTIVE BLVD ROCKVILLE, MD 20852	2018-09-17	3,000,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE JEWISH FEDERATION OF GREATER WASHINGTON. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	3,000,000	NONE	12/31/2024		JEWISH FEDERATION OF GREATER WASHINGTON HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
POZEZ JEWISH COMMUNITY CENTER OF NORTHERN VIRGINIA	8900 LITTLE RIVER TURNPIKE FAIRFAX, VA 22031	2018-07-14	2,000,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE POZEZ JEWISH COMMUNITY CENTER OF NORTHERN VIRGINIA. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	2,000,000	NONE	12/31/2024		POZEZ JEWISH COMMUNITY CENTER OF NORTHERN VIRGINIA HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
BENDER JCC OF GREATER WASHINGTON	6125 MONTROSE ROAD ROCKVILLE, MD 20852	2017-11-16	4,000,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE BENDER JCC OF GREATER WASHINGTON. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	4,000,000	NONE	12/31/2024		BENDER JCC OF GREATER WASHINGTON HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
EDLAVITCH JCC OF WASHINGTON DC	1529 16TH STREET NW WASHINGTON, DC 20036	2018-06-29	13,000,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE EDLAVITCH JCC OF WASHINGTON, DC. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	13,000,000	NONE	12/31/2024		EDLAVITCH JCC OF WASHINGTON, DC HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
CAPITAL CAMPS & RETREAT CENTER	11300 ROCKVILLE PIKE SUITE 407 ROCKVILLE, MD 20852	2018-06-26	3,250,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE CAPITAL CAMPS & RETREAT CENTER. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	3,250,000	NONE	12/31/2024		CAPITAL CAMPS & RETREAT CENTER HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
JEWISH FEDERATION OF GREATER WASHINGTON	6101 EXECUTIVE BLVD ROCKVILLE, MD 20852	2021-06-29	4,800,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE JEWISH FEDERATION OF GREATER WASHINGTON. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	4,800,000	NONE	12/31/2024		JEWISH FEDERATION OF GREATER WASHINGTON HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
POZEZ JEWISH COMMUNITY CENTER OF NORTHERN VIRGINIA	8900 LITTLE RIVER TURNPIKE FAIRFAX, VA 22031	2017-06-30	2,250,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE POZEZ JEWISH COMMUNITY CENTER OF NORTHERN VIRGINIA. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	2,250,000	NONE	12/31/2024		POZEZ JEWISH COMMUNITY CENTER OF NORTHERN VIRGINIA HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE SARAH AND DANIEL RUEVEN FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-05-16	5,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	5,000	NONE	12/31/2024		THE SARAH AND DANIEL RUEVEN FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE SARAH AND DANIEL RUEVEN FOUNDATION	126 E 56TH ST 26TH FLOOR NEW YORK, NY 10022	2024-06-04	10,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	10,000	NONE	12/31/2024		THE SARAH AND DANIEL RUEVEN FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
THE SARAH	126 E 56TH	2024-06-	557,500	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION	557,500	NONE	12/31/2024		THE SARAH AND DANIEL

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
AND DANIEL RUEVEN FOUNDATION	ST 26TH FLOOR NEW YORK, NY 10022	10		4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.					RUEVEN FOUNDATION HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.
MARYLAND HILLEL	7612 MOWATT LANE COLLEGE PARK, MD 20740	2024-12-10	7,700,000	THE FOLLOWING INFORMATION IS PROVIDED IN ACCORDANCE WITH IRC SECTION 4945(H)(3) AND REG. 53.4945-5(D) TO DEMONSTRATE THAT THE FOUNDATION HAS EXERCISED EXPENDITURE RESPONSIBILITY IN REGARD TO ITS GRANT TO THE SARAH AND DANIEL RUEVEN FOUNDATION. THE FUNDS TRANSFERRED TO THE ORGANIZATION WERE USED EXCLUSIVELY FOR THE ORGANIZATION'S OPERATING SUPPORT AND CHARITABLE PURPOSE.	7,700,000	NONE	12/31/2024		MARYLAND HILLEL HAS SUBMITTED A FULL AND COMPLETE ANNUAL REPORT CONCERNING THE MANNER IN WHICH THE FUNDS WERE SPENT FOR THE TAX YEAR ENDING DECEMBER 31, 2024.

TY 2024 IRS 990 e-File Render

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
AEA INVESTORS FUND V, L.P.	FMV	424,849	424,849
CARLYLE PARTNERS VI, L.P.	FMV	1,546,124	1,546,124
KEDMA CAPITAL PARTNERS II, L.P.	FMV	2,040,915	2,040,915
KHOSLA VENTURES III, L.P.	FMV	72,219	72,219
LEGACY VENTURE V, LLC	FMV	586,286	586,286
NEW ENTERPRISE ASSOCIATES 14, L.P.	FMV	8,076,080	8,076,080
NEW HERITAGE CAPITAL FUND-B, L.P.	FMV	182,277	182,277
NEWBURY EQUITY PARTNERS II, L.P.	FMV	314,526	314,526
PATRON CAPITAL GP IV	FMV	84,693	84,693
ROYALTY OPPORTUNITIES FEEDER S.A.	FMV	230,780	230,780
THE VARDE FUND X (A) (FEEDER), L.P.	FMV	93,248	93,248
MINERVA NETWORKS, INC AD-56	FMV	2,312	2,312
MINERVA NETWORKS, INC AV-56	FMV	6,878	6,878
BLACKSTONE TACTICAL OPPORTUNITIES FUND II L.P.	FMV	732,376	732,376
CIP VI INSTITUTIONAL FEEDER, L.P.	FMV	1,206,510	1,206,510
LEERINK REVELATION HEALTHCARE FUND I, L.P.	FMV	441,331	441,331
NEW ENTERPRISE ASSOCIATES 15, L.P.	FMV	1,735,659	1,735,659
THE VARDE FUND XII (A), L.P.	FMV	638,940	638,940
MORNINGSTAR SATURN I LLC	FMV	118,836,515	118,836,515
MORNINGSTAR NEPTUNE LLC	FMV	3,004,661	3,004,661
MORNINGSTAR VENUS LLC	FMV	346,282,133	346,282,133
CIP AIV II, LP	FMV	175,593	175,593
HIGHVISTA VENTURE CAPITAL VI (OFFSHORE), LP	FMV	470,256	470,256

TY 2024 IRS 990 e-File Render

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	117	0		117

TY 2024 IRS 990 e-File Render

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
PROGRAM-RELATED INVESTMENTS	17,737,031	23,601,707	23,601,707

TY 2024 IRS 990 e-File Render

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK SERVICE CHARGES	50	0		50
COMPUTER SUPPORT	30,216	0		30,216
INTERNET EXPENSES	4,939	0		4,939
DUES & SUBSCRIPTIONS	1,535	0		1,535
PRINTING & COPYING	2,408	0		2,408
SUPPLIES	2,459	0		2,459
INSURANCE	7,055	0		7,055
TELEPHONE, TELECOMMUNICATIONS	168	0		168
K-1 OTHER DEDUCTIONS	2,165,790	2,165,790		0
CONFERENCE AND SEMINARS	43,318	0		43,318
CONSULTING SERVICES	117,856	0		117,856
MEALS	390	0		390
PARKING	4,049	0		4,049
FILING FEE	565	0		565
MISCELLANEOUS EXPENES	1,670	0		1,670

TY 2024 IRS 990 e-File Render

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
K-1 OTHER INCOME	424,425	424,425	424,425
OTHER INCOME	5,810	0	5,810

TY 2024 IRS 990 e-File Render

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Description	Amount
NET UNREALIZED GAIN	33,857,239

TY 2024 IRS 990 e-File Render

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Description	Beginning of Year - Book Value	End of Year - Book Value
OTHER LIABILITIES	0	16,281

TY 2024 IRS 990 e-File Render

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	4,400,512	4,400,512		0
PAYROLL PROCESSING	4,240	0		4,240
OTHER CONTRACT SERVICES	26,400	0		26,400

TY 2024 IRS 990 e-File Render

Name: THE MORNINGSTAR PHILANTHROPIC FOUNDATION
D/B/A THE MORNINGSTAR FOUNDATION

EIN: 52-1270464

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
K-1 FOREIGN TAXES PAID	71,214	71,214		0