

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.

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

Name of foundation: RUTH & PETER METZ FAMILY FOUNDATION co THOMAS PHELAN. A Employer identification number: 52-1591150. B Telephone number: (908) 232-2244. C If exemption application is pending, check here. D 1. Foreign organizations, check here. D 2. Foreign organizations meeting the 85% test, check here and attach computation. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. H Check type of organization: Section 501(c)(3) exempt private foundation. J Accounting method: Cash. Fair market value of all assets at end of year: \$12,511,518.

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).)

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), leading to Total operating and administrative expenses of 190,489 and Total expenses and disbursements of 786,489. Final net investment income is 687,534.

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	344,901	257,838	257,838
	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)	8,796,059	8,962,336	12,248,772
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____			
Less: accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)				
14 Land, buildings, and equipment: basis ▶ _____				
Less: accumulated depreciation (attach schedule) ▶ _____				
15 Other assets (describe ▶ _____)	10,926	4,908	4,908	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	9,151,886	9,225,082	12,511,518	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue.			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	9,151,886	9,225,082	
	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)	9,151,886	9,225,082	
30 Total liabilities and net assets/fund balances (see instructions)	9,151,886	9,225,082		

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	9,151,886
2 Enter amount from Part I, line 27a	2	73,196
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	9,225,082
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	9,225,082

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows include BofA a/c #82574537 and #82574538.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Rows correspond to items a-e from the previous table.

Table with 4 columns: (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), (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)).

Summary rows for capital gain net income (line 2) and net short-term capital gain or (loss) (line 3).

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

Table for excise tax calculation with 11 rows. Includes exemptions (1a), tax under section 511 (2), tax based on investment income (5), credits/payments (6a-6d), total credits (7), penalty (8), tax due (9), overpayment (10), and amount of line 10 to be credited (11).

Part VI-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

Table with columns Yes, No and row 1a

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.

Table with columns Yes, No and row 1b

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?

Table with columns Yes, No and row 1c

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. (2) On foundation managers.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.

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.

Table with columns Yes, No and row 2

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.

Table with columns Yes, No and row 3

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

Table with columns Yes, No and row 4a

b If "Yes," has it filed a tax return on Form 990-T for this year?

Table with columns Yes, No and row 4b

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.

Table with columns Yes, No and row 5

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?

Table with columns Yes, No and row 6

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.

Table with columns Yes, No and row 7

8a Enter the states to which the foundation reports or with which it is registered (see instructions)

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.

Table with columns Yes, No and row 8b

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.

Table with columns Yes, No and row 9

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

Table with columns Yes, No and row 10

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.

Table with columns Yes, No and row 11

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.

Table with columns Yes, No and row 12

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address

Table with columns Yes, No and row 13

14 The books are in care of THOMAS PHELAN Telephone no. (908) 232-2244 Located at 210 ORCHARD STREET WESTFIELD NJ ZIP+4 07090

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.

Table with columns Yes, No and row 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.

Table with columns Yes, No and row 16

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

- 1a** During the year did the foundation (either directly or indirectly):
 - (1)** Engage in the sale or exchange, or leasing of property with a disqualified person?
 - (2)** Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
 - (3)** Furnish goods, services, or facilities to (or accept them from) a disqualified person?
 - (4)** Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
 - (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)?
 - (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.)
- 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
- 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?
- 2** Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
 - a** At the end of tax year 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024?
If "Yes," list the years ► 20___, 20___, 20___, 20___
 - 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.)
 - 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?
- 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.)
- 4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
- 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?

	Yes	No
1a(1)		No
1a(2)		No
1a(3)		No
1a(4)		No
1a(5)		No
1a(6)		No
1b		No
1d		No
2a		No
2b		
3a		No
3b		
4a		No
4b		No

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

- 5a During the year did the foundation pay or incur any amount to:
(1) Carry on propaganda, or otherwise attempt to influence legislation...
(2) Influence the outcome of any specific public election...
(3) Provide a grant to an individual for travel, study, or other similar purposes...
(4) Provide a grant to an organization other than a charitable, etc., organization...
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes...
b If any answer is "Yes" to 5a(1)-(5); did any of the transactions fail to qualify under the exceptions...
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...
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
6b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?
7b If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

Table with 3 columns: Question ID, Yes, No. Rows include 5a(1) through 8.

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

Table with 5 columns: (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. Includes entries for W PETER METZ III, MICHAEL M METZ, SARAH METZ KRISOFF, DENISE SHEKERJIAN, THOMAS C PHELAN, DAVID METZ, AUSTIN KRISOFF, LUKE METZ, MATTHEW METZ, JULIETTE WALLACK, KRISTIE DAFOE.

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


Table with 5 columns: (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. All entries are NONE.

Total number of other employees paid over \$50,000.

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
MERRILL LYNCH 100 CAMPUS DRIVE FLORHAM PARK, NJ 07932	INVESTMENT ADVISORY	129,156

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

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 None	0
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3 

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	11,889,621
b	Average of monthly cash balances.	1b	403,786
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	12,293,407
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	
3	Subtract line 2 from line 1d.	3	12,293,407
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	184,401
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	12,109,006
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	605,450

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	605,450
2a	Tax on investment income for 2024 from Part V, line 5.	2a	9,557
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	9,557
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	595,893
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	595,893
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	595,893

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	615,860
b	Program-related investments—total from Part VIII-B	1b	
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	615,860

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				595,893
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2024:				
a From 2019.			44,527	
b From 2020.				
c From 2021.				
d From 2022.			85,738	
e From 2023.			59,815	
f Total of lines 3a through e.	190,080			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ _____			615,860	
a Applied to 2023, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2024 distributable amount				595,893
e Remaining amount distributed out of corpus	19,967			
5 Excess distributions carryover applied to 2024. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	210,047			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
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				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.				
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).				
8 Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)	44,527			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	165,520			
10 Analysis of line 9:				
a Excess from 2020				
b Excess from 2021				
c Excess from 2022.	85,738			
d Excess from 2023	59,815			
e Excess from 2024	19,967			

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)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2024	(b) 2023	(c) 2022	(d) 2021	
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 3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i> BURLINGTON CITY ARTS FDN 135 CHURCH STREET BURLINGTON,VT 05401 UNITED WAY OF NW VERMONT	NONE	501(c)	PROVIDE OPERATING FUNDS	35,000
412 FARRELL ST - STE 200 SOUTH BURLINGTON,VT 05403 COMMITTEE ON TEMP SHELTER	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
PO BOX 1616 BURLINGTON,VT 05402 CHAMPLAIN COLLEGE	NONE	501(c)	PROVIDE OPERATING FUNDS	4,000
163 SOUTH WILLARD ST BURLINGTON,VT 05401 SEABA EXHIBITIONS	NONE	501(c)	PROVIDE OPERATING FUNDS	5,000
28 HOWARD STREET BURLINGTON,VT 05401 MERCY CONNECTIONS	NONE	501(c)	PROVIDE OPERATING FUNDS	2,000
255 S CHAMPLAIN ST - STE 8 BURLINGTON,VT 05401 SHELburnE MUSEUM	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
PO BOX 10 SHELburnE,VT 05482 FLYNN CTR FOR PERFORM ARTS	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
153 MAIN STREET BURLINGTON,VT 05401 HUMANE SOCIETY OF CHITTENDEN COUNTY	NONE	501(c)	PROVIDE OPERATING FUNDS	2,000
142 KINDNESS COURT SOUTH BURLINGTON,VT 05403 STERN CENTER	NONE	501(c)	PROVIDE OPERATING FUNDS	5,000
183 TALCOTT ROAD - STE 101 WILLISTON,VT 05495 WIKIMEDIA FOUNDATION INC	NONE	501(c)	PROVIDE OPERATING FUNDS	6,050
PO BOX 98204 WASHINGTON,DC 20090 CHARITY NAVIGATOR	NONE	501(c)	PROVIDE OPERATING FUNDS	700
139 HARRISTOWN RD - STE 101 GLEN ROCK,NJ 07452 GENERATOR INC	NONE	501(c)	PROVIDE OPERATING FUNDS	91,000
PO BOX 64853 S BURLINGTON,VT 05406 SPECTRUM YOUTH FAMILY SERVICES	NONE	501(c)	PROVIDE OPERATING FUNDS	5,000
31 ELMWOOD AVENUE BURLINGTON,VT 05401 PLANNED PARENTHOOD OF NO NEW ENGLAN	NONE	501(c)	PROVIDE OPERATING FUNDS	2,000
784 HERCULES DR - STE 110 COLCHESTER,VT 05446 VERMONT PUBLIC	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
365 TROY AVENUE COLCHESTER,VT 05446 OLIN COLLEGE	NONE	501(c)	HOOVER MEMORIAL ENDOWMENT FUND	10,000
1000 OLIN WAY NEEDHAM,MA 02492 BOSTON HEALTHCARE FOR THE HOMELESS	NONE	501(c)	PROVIDE OPERATING FUNDS	2,500
780 ALBANY STREET BOSTON,MA 02118 APPALACHIAN MOUNTAIN CLUB	NONE	501(c)	PROVIDE OPERATING FUNDS	7,000
10 CITY SQUARE BOSTON,MA 02129 VT DIGGER	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
26 STATE STREET - STE 8 MONTPELIER,VT 05602 EARTH JUSTICE	NONE	501(c)	PROVIDE OPERATING FUNDS	875
50 CALIFORNIA ST - STE 500 SAN FRANCISCO,CA 94111 STEVENSON SCHOOL	NONE	501(c)	PROVIDE OPERATING FUNDS	5,000
24 W 74TH STREET NEW YORK,NY 10023 INTERVALE CENTER	NONE	501(C)	PROVIDE OPERATING FUNDS	4,000
180 INTERVALE ROAD BURLINGTON,VT 05401 KENYON COLLEGE	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
105 CHASE AVENUE GAMBIER,OH 43022 LEXINGTON COMMUNITY FARM	NONE	501(C)	2023 GEODESIC DOME	7,500
52 LOWELL STREET LEXINGTON,MA 02420 AMERICAN WHITEWATER ASSOC	NONE	501(C)	PROVIDE OPERATING FUNDS	2,500
PO BOX 1540 CULLOWHEE,NC 28723 LAUNCH VT	NONE	501(C)	PROVIDE OPERATING FUNDS	10,000
60 MAIN STREET BURLINGTON,VT 05401 ECHO - LEAHY CENTER	NONE	501(C)	PROVIDE OPERATING FUNDS	4,000
1 COLLEGE STREET BURLINGTON,VT 05401 CENTER FOR WOMEN ENTERPRISE	NONE	501(C)	PROVIDE OPERATING FUNDS	2,000
44 SCHOOL STREET - STE 200 BOSTON,MA 02108 NATURAL RESOURCES DEFENSE COUNCIL	NONE	501(C)	PROVIDE OPERATING FUNDS	2,875
40 WEST 20TH ST - 11TH FL NEW YORK,NY 10011 INDIANA U-MAUER SCH OF LAW	NONE	501(C)	PROVIDE OPERATING FUNDS	2,500
PO BOX 500 BLOOMINGTON,IN 47402 PAWS	NONE	501(C)	PROVIDE OPERATING FUNDS	1,000
15305 44TH AVENUE W LYNNWOOD,WA 98087 THE JANET MUNT FAMILY ROOM	NONE	501(C)	PROVIDE OPERATING FUNDS	4,000
20 ALLEN STREET BURLINGTON,VT 05401 ROOM TO GROW	NONE	501(C)	PROVIDE OPERATING FUNDS	6,000
400 SHAWMUT AVENUE BOSTON,MA 02118 ELECTRONIC FRONTIER FDN	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
815 EDDY STREET SAN FRANCISCO,CA 94109 KING STREET CENTER	NONE	501(C)	PROVIDE OPERATING FUNDS	1,000
87 KING STREET BURLINGTON,VT 05402 VT ACADEMY OF SCIENCE ENG	NONE	501(C)	PROVIDE OPERATING FUNDS	10,000
PO BOX 4158 BURLINGTON,VT 05406 LILITH FUND	NONE	501(c)	PROVIDE OPERATING FUNDS	1,750
PO BOX 684949 AUSTIN,TX 78768 THE TRUSTEES OF RESERVATIONS	NONE	501(c)	PROVIDE OPERATING FUNDS	2,500
200 HIGH STREET - 4th FL BOSTON,MA 02110 JOURNALISM FUNDING PARTNERS	NONE	501(c)	PROVIDE OPERATING FUNDS	5,000
1731 HOWE AVENUE - 242 SACRAMENTO,CA 95825 ARLINGTON COMMUNITY FDN	NONE	501(c)	PROVIDING OPERATING FUNDS	5,000
818 N QUINCY STREET ARLINGTON,VA 22203 ARLINGTON FREE CLINIC	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
2921 11th STREET SOUTH ARLINGTON,VA 22204 ARLINGTON FOOD ASSIST CTR	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
2708 S NELSON STREET ARLINGTON,VA 22206 VA LEAGUE OF PLANNED PARENTHOOD	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
201 N HAMILTON STREET RICHMOND,VA 23221 LARKIN STREET YOUTH SVS	NONE	501(c)	PROVIDE OPERATING FUNDS	1,500
134 GOLDEN GATE AVENUE SAN FRANCISCO,CA 94102 HAMILTON FAMILIES	NONE	501(c)	PROVIDE OPERATING FUNDS	1,500
273 NINTH STREET SAN FRANCISCO,CA 94103 SCHUYKILL RIVER PARK FUND	NONE	501(c)	PROVIDE OPERATING FUNDS	14,000
PO BOX 30246 PHILADELPHIA,PA 19103 BTV IGNITE	NONE	501(c)	PROVIDE OPERATING FUNDS	32,500
60 MAIN STREET BURLINGTON,VT 05401 FRIENDS OF THE ARLINGTON PUBLIC LIB	NONE	501(c)	PROVIDE OPERATING FUNDS	2,500
1015 N QUINCY STREET ARLINGTON,VA 22201 DOORWAYS	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
PO BOX 100185 ARLINGTON,VA 22210 ARLINGTON NEIGHBORHOOD VILLAGE	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
2666 MILITARY ROAD ARLINGTON,VA 22207 TEAM IMPACT	NONE	501(c)	PROVIDE OPERATING FUNDS	1,500
500 VICTORY ROAD QUINCY,MA 02171 VERMONT ARTS COUNCIL	NONE	501(c)	PROVIDE OPERATING FUNDS	4,000
136 STATE STREET MONTPELIER,VT 05633 AMER ACAD OF CHLD ADOLESCENT PSYCH	NONE	501(C)	PROVIDE OPERATING FUNDS	10,000
3615 WASHINGTON AVE NW WASHINGTON,DC 20016 WORCESTER ART MUSEUM	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
55 SALISBURY STREET WORCESTER,MA 01609 MIDDLEBURY COLLEGE	NONE	501(C)	PROVIDE OPERATING FUNDS	1,000
700 EXCHANGE STREET MIDDLEBURY,VT 05753 CONCORD CARLISLE FDN	NONE	501(C)	PROVIDE OPERATING FUNDS	2,500
37 MAIN STREET - STE 3 CONCORD,MA 01742 GAINING GROUND INC	NONE	501(C)	PROVIDE OPERATING FUNDS	1,000
12 POND LANE CONCORD,MA 01742 BOSTON SYMPHONY ORCHESTRA	NONE	501(C)	PROVIDE OPERATING FUNDS	10,000
301 MASSACHUSETTS AVENUE BOSTON,MA 02115 LEAGUE OF WOMEN VOTERS	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
1011 E MAIN ST - STE 214A RICHMOND,VA 23219 HOUSE OF RUTH	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
5 THOMAS CIRCLE NW WASHINGTON,DC 20005 WMHT PUBLIC MEDIA	NONE	501(C)	PROVIDE OPERATING FUNDS	2,000
4 GLOBAL VIEW TROY,NY 12180 AMERICAN ANTIQUARIAN STY	NONE	501(C)	PROVIDE OPERATING FUNDS	2,000
185 SALISBURY STREET WORCESTER,MA 01609 GBH BEACON CIRCLE	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
ONE GUEST STREET BOSTON,MA 02135 STOCKBRIDGE BOWL ASSOC		501(C)	PROVIDE OPERATING FUNDS	2,000
PO BOX 118 STOCKBRIDGE,MA 01262 MA AUDOBON SOCIETY	NONE	501(C)	PROVIDE OPERATING FUNDS	10,000
208 S GREAT ROAD LINCOLN,MA 01773 NE BOTANIC GARDEN at TOWER HILL	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
11 FRENCH DRIVE BOYLSTON,MA 01505 ECOTARIUM	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
222 HARRINGTON WAY WORCESTER,MA 01604 JCC OF WORCESTER	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
633 SALISBURY STREET WORCESTER,MA 01609 ANIMAL WELFARE LEAGUE OF ARLINGTON	NONE	501(C)	PROVIDE OPERATING FUNDS	1,000
2650 SO ARLINGTON MILL DR ARLINGTON,VA 22206 WORCESTER CHAMBER MUSIC STY	NONE	501(C)	PROVIDE OPERATING FUNDS	10,000
323 MAIN STREET WORCESTER,MA 01608 RAILROAD ST YOUTH PROJECT	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
70 RAILROAD STREET - STE 9 GREAT BARRINGTON,MA 01230 BERKSHIRE UNITED WAY	NONE	501(C)	PROVIDE OPERATING FUNDS	4,000
200 SOUTH STREET PITTSFIELD,MA 01201 BERKSHIRE SOUTH REG COMM	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
15 CRISSEY ROAD GREAT BARRINGTON,MA 01230 W STOCKBRIDGE HIST SOCIETY	NONE	501(C)	PROVIDE OPERATING FUNDS	10,000
PO BOX 266 WEST STOCKBRIDGE,MA 01266 FRIENDS OF THE LENOX MEETING HOUSE	NONE	501(C)	PROVIDE OPERATING FUNDS	6,500
PO BOX 1871 LENOX,MA 01240 UMASS MEMORIAL HEALTH	NONE	501(C)	SUPPORT OF THE CANDO CLINIC	12,500
365 PLANTATION STREET WORCESTER,MA 01605 THE SHINE INITIATIVE	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
44 PORTLAND STREET WORCESTER,MA 01608 GOULD FARM	NONE	501(C)	PROVIDE OPERATING FUNDS	9,500
100 GOULD FARM MONTEREY,MA 01245 FOOD BANK OF WESTERN MA	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
85 CAREW STREET CHICOPEE,MA 01020 COMMUNITY HEALTHLINK OF UMASS MEMOR	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
72 JAKUES AVENUE WORCESTER,MA 01610 MONTESSORI SCHOOL OF THE BERKSHIRES	NONE	501(C)	PROVIDE OPERATING FUNDS	10,300
55 PITTSFIELD ROAD LENOX,MA 01240 MANN CENTER FOR PERF ARTS	NONE	501(C)	PROVIDE OPERATING FUNDS	1,750
123 S BROAD STREET PHILADELPHIA,PA 19109 VOLUNTEERS IN MEDICINE - BERKSHIRES	NONE	501(C)	PROVIDE OPERATING FUNDS	3,200
199 SOUTH STREET PITTSFIELD,MA 01201 MUSIC WORCESTER	NONE	501(C)	PROVIDE OPERATING FUNDS	15,500
319 MAIN STREET WORCESTER,MA 01608 CASA PROJECT WORCESTER CTY	NONE	501(C)	PROVIDE OPERATING FUNDS	10,000
100 GROVE STREET WORCESTER,MA 01605 WORCESTER COUNTY FOOD BANK	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
474 BOSTON TPKE SHREWSBURY,MA 01545 ABBY'S HOUSE	NONE	501(C)	PROVIDE OPERATING FUNDS	2,000
52 HIGH STREET WORCESTER,MA 01609 YMCA OF CENTRAL MA	NONE	501(C)	PROVIDE OPERATING FUNDS	15,000
1 SALEM SQUARE WORCESTER,MA 01608 EQUAL JUSTICE INITIATIVE	NONE	501(C)	PROVIDE OPERATING FUNDS	2,000
122 COMMERCE STREET MONTGOMERY,AL 36104 CORNELL LAB OF ORNITHOLOGY	NONE	501(C)	PROVIDE OPERATING FUNDS	2,000
159 SAPSUCKER WOODS ROAD ITHACA,NY 14850 HEIFER INTERNATIONAL	NONE	501(C)	PROVIDE OPERATING FUNDS	1,000
1 WORLD AVENUE LITTLE ROCK,AR 72202 PROJECT HOME	NONE	501(C)	PROVIDE OPERATING FUNDS	14,000
1515 FAIRMOUNT AVENUE PHILADELPHIA,PA 19130 UNITED WAY OF CENTRAL MA	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
18 CHESTNUT ST - STE 530 WORCESTER,MA 01608 ANTI-DEFAMATION LEAGUE	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
605 THIRD AVENUE NEW YORK,NY 10158 PLANNED PARENTHOOD OF MA	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
1055 COMMONWEALTH AVENUE BOSTON,MA 02215 DOCTORS WITHOUT BORDERS	NONE	501(C)	PROVIDE OPERATING FUNDS	4,000
40 RECTOR ST - 16TH FL NEW YORK,NY 10006 TEREZIN MUSIC FOUNDATION	NONE	501(C)	ANNUAL GALA	2,000
PO BOX 230206 BOSTON,MA 02123 ARTSWORCESTER	NONE	501(C)	PROVIDE OPERATING FUNDS	4,000
44 PORTLAND STREET WORCESTER,MA 01608				
Total			3a	596,000
b Approved for future payment				
Total			3b	

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

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

5 Net rental income or (loss) from real estate:

a Debt-financed property

b Not debt-financed property

6 Net rental income or (loss) from personal property

7 Other investment income

8 Gain or (loss) from sales of assets other than inventory

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)

13 Total. Add line 12, columns (b), (d), and (e)

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

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include items 1-13 with numerical values in column (e).

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.)

4 & 7 THESE INVESTMENT ACTIVITIES ARE THE PRIMARY MEANS BY WHICH THE ORGANIZATION ACCOMPLISHES ITS GOALS.

Additional Data

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Software ID: 24020490

Software Version: 2024v5.2

Form 990PF - Special Condition Description:

Special Condition Description

Schedule of Contributors

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

Name of the organization RUTH & PETER METZ FAMILY FOUNDATION c/o THOMAS PHELAN	Employer identification number 52-1591150
--	---

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 33¹/₃% 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
 RUTH & PETER METZ FAMILY FOUNDATION
 c/o THOMAS PHELAN

Employer identification number
 52-1591150

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	ESTATE OF W PETER METZ Jr c/o T PHELAN - 210 ORCHARD ST WESTFIELD, NJ 07090	\$ 9,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization
 RUTH & PETER METZ FAMILY FOUNDATION
 co THOMAS PHELAN

Employer identification number
 52-1591150

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
-	_____ _____ _____	_____ \$	_____
(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
-	_____ _____ _____	_____ \$	_____
(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
 RUTH & PETER METZ FAMILY FOUNDATION
 c/o THOMAS PHELAN

Employer identification number
 52-1591150

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	
_____ _____		_____ _____	
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	
	_____ _____	_____ _____	_____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____	

Additional Data

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TY 2024 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION
co THOMAS PHELAN

EIN: 52-1591150

Software ID: 24020490

Software Version: 2024v5.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Walter P O'Brien, CPA, LLC	6,105	6,105	0	0

TY 2024 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION
co THOMAS PHELAN

EIN: 52-1591150

Software ID: 24020490

Software Version: 2024v5.2

Statement: NOT REQUIRED BY THE STATE OF NEW JERSEY

TY 2024 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION
co THOMAS PHELAN

EIN: 52-1591150

Software ID: 24020490

Software Version: 2024v5.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Thomas Phelan, Esq	2,000	1,000	0	1,000

TY 2024 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION

co THOMAS PHELAN

EIN: 52-1591150

Software ID: 24020490

Software Version: 2024v5.2

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Due from Broker	10,926	4,908	4,908

TY 2024 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION
co THOMAS PHELAN

EIN: 52-1591150

Software ID: 24020490

Software Version: 2024v5.2

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Fees - Portfolio Mgt	129,156	129,156		
Foreign Taxes Withheld	4,824	4,824		
Other Trading Expenses	1,335	1,335		
Service Charges	99	99		

TY 2024 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION

co THOMAS PHELAN

EIN: 52-1591150

Software ID: 24020490

Software Version: 2024v5.2

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	1,493	1,493	

TY 2024 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION
co THOMAS PHELAN

EIN: 52-1591150

Software ID: 24020490

Software Version: 2024v5.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Income Taxes	9,250			