

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

|                                                                                                                                                                                                                                                                                                                           |  |                                                                                                                                                                                       |                                                         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| Name of foundation<br>Wallace H Coulter Trust                                                                                                                                                                                                                                                                             |  | A Employer identification number<br>65-6310670                                                                                                                                        |                                                         |
| Number and street (or P.O. box number if mail is not delivered to street address)<br>1515 US HWY 1 202                                                                                                                                                                                                                    |  | Room/suite                                                                                                                                                                            | B Telephone number (see instructions)<br>(305) 559-2991 |
| City or town, state or province, country, and ZIP or foreign postal code<br>SEBASTIAN, FL 32958                                                                                                                                                                                                                           |  | C If exemption application is pending, check here <input type="checkbox"/>                                                                                                            |                                                         |
| G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity<br><input checked="" type="checkbox"/> Final return <input type="checkbox"/> Amended return<br><input checked="" type="checkbox"/> Address change <input type="checkbox"/> Name change |  | D 1. Foreign organizations, check here..... <input type="checkbox"/><br>2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/> |                                                         |
| H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation                                                                         |  | E If private foundation status was terminated under section 507(b)(1)(A), check here ..... <input type="checkbox"/>                                                                   |                                                         |
| I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 0                                                                                                                                                                                                                                  |  | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... <input type="checkbox"/>                                                                |                                                         |
| J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____<br>(Part I, column (d) must be on cash basis.)                                                                                                                           |  |                                                                                                                                                                                       |                                                         |

| Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</small> |                                                                                                                 | (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 <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B . . . . . |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 3 Interest on savings and temporary cash investments . . . . .                                                  | 198,640                            | 198,640                   |                         |                                                             |
|                                                                                                                                                                                    | 4 Dividends and interest from securities . . . . .                                                              | 64,139                             | 64,139                    |                         |                                                             |
|                                                                                                                                                                                    | 5a Gross rents . . . . .                                                                                        |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | b Net rental income or (loss) _____                                                                             |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 6a Net gain or (loss) from sale of assets not on line 10                                                        | 5,505,647                          |                           |                         |                                                             |
|                                                                                                                                                                                    | b Gross sales price for all assets on line 6a _____<br>11,062,461                                               |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 7 Capital gain net income (from Part IV, line 2) . . . . .                                                      |                                    | 5,517,268                 |                         |                                                             |
|                                                                                                                                                                                    | 8 Net short-term capital gain . . . . .                                                                         |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 9 Income modifications . . . . .                                                                                |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 10a Gross sales less returns and allowances _____                                                               |                                    |                           |                         |                                                             |
| Operating and Administrative Expenses                                                                                                                                              | b Less: Cost of goods sold . . . . .                                                                            |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | c Gross profit or (loss) (attach schedule) . . . . .                                                            |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 11 Other income (attach schedule) . . . . .                                                                     | 8,669                              | 8,669                     |                         |                                                             |
|                                                                                                                                                                                    | 12 <b>Total.</b> Add lines 1 through 11 . . . . .                                                               | 5,777,095                          | 5,788,716                 |                         |                                                             |
|                                                                                                                                                                                    | 13 Compensation of officers, directors, trustees, etc.                                                          | 0                                  | 0                         |                         | 0                                                           |
|                                                                                                                                                                                    | 14 Other employee salaries and wages . . . . .                                                                  |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 15 Pension plans, employee benefits . . . . .                                                                   |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 16a Legal fees (attach schedule) . . . . .                                                                      |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | b Accounting fees (attach schedule) . . . . .                                                                   | 95,885                             | 0                         |                         | 95,885                                                      |
|                                                                                                                                                                                    | c Other professional fees (attach schedule) . . . . .                                                           | 19,322                             | 15,422                    |                         | 3,900                                                       |
|                                                                                                                                                                                    | 17 Interest . . . . .                                                                                           |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 18 Taxes (attach schedule) (see instructions) . . . . .                                                         | 170,343                            | 0                         |                         | 0                                                           |
|                                                                                                                                                                                    | 19 Depreciation (attach schedule) and depletion . . . . .                                                       |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 20 Occupancy . . . . .                                                                                          | 12,996                             | 0                         |                         | 12,996                                                      |
|                                                                                                                                                                                    | 21 Travel, conferences, and meetings . . . . .                                                                  | 200,000                            | 0                         |                         | 200,000                                                     |
|                                                                                                                                                                                    | 22 Printing and publications . . . . .                                                                          |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | 23 Other expenses (attach schedule) . . . . .                                                                   | 3,443                              | 191                       |                         | 3,252                                                       |
|                                                                                                                                                                                    | 24 <b>Total operating and administrative expenses.</b><br>Add lines 13 through 23 . . . . .                     | 501,989                            | 15,613                    |                         | 316,033                                                     |
|                                                                                                                                                                                    | 25 Contributions, gifts, grants paid . . . . .                                                                  | 15,865,740                         |                           |                         | 15,865,740                                                  |
|                                                                                                                                                                                    | 26 <b>Total expenses and disbursements.</b> Add lines 24 and 25                                                 | 16,367,729                         | 15,613                    |                         | 16,181,773                                                  |
|                                                                                                                                                                                    | 27 Subtract line 26 from line 12:                                                                               |                                    |                           |                         |                                                             |
|                                                                                                                                                                                    | a <b>Excess of revenue over expenses and disbursements</b>                                                      | -10,590,634                        |                           |                         |                                                             |
|                                                                                                                                                                                    | b <b>Net investment income</b> (if negative, enter -0-)                                                         |                                    | 5,773,103                 |                         |                                                             |
|                                                                                                                                                                                    | c <b>Adjusted net income</b> (if negative, enter -0-)                                                           |                                    |                           |                         |                                                             |

| Part II                     |                                                                                                                              | Balance Sheets                                                                                                                    | Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.) | Beginning of year                                                                       | End of year    |                       |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|----------------|-----------------------|
|                             |                                                                                                                              |                                                                                                                                   |                                                                                                                      | (a) Book Value                                                                          | (b) Book Value | (c) Fair Market Value |
| Assets                      | 1                                                                                                                            | Cash—non-interest-bearing . . . . .                                                                                               |                                                                                                                      |                                                                                         |                |                       |
|                             | 2                                                                                                                            | Savings and temporary cash investments . . . . .                                                                                  | 2,896,942                                                                                                            |                                                                                         |                |                       |
|                             | 3                                                                                                                            | Accounts receivable ▶ _____<br>Less: allowance for doubtful accounts ▶ _____                                                      |                                                                                                                      |                                                                                         |                |                       |
|                             | 4                                                                                                                            | Pledges receivable ▶ _____<br>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) ▶ _____<br>Less: allowance for doubtful accounts ▶ _____                       |                                                                                                                      |                                                                                         |                |                       |
|                             | 8                                                                                                                            | Inventories for sale or use . . . . .                                                                                             |                                                                                                                      |                                                                                         |                |                       |
|                             | 9                                                                                                                            | Prepaid expenses and deferred charges . . . . .                                                                                   | 3,162                                                                                                                |                                                                                         |                |                       |
|                             | 10a                                                                                                                          | Investments—U.S. and state government obligations (attach schedule)                                                               | 4,437,538                                                                                                            | 0                                                                                       | 0              |                       |
|                             | b                                                                                                                            | Investments—corporate stock (attach schedule) . . . . .                                                                           | 4,988,247                                                                                                            | 0                                                                                       | 0              |                       |
|                             | c                                                                                                                            | Investments—corporate bonds (attach schedule) . . . . .                                                                           |                                                                                                                      |                                                                                         |                |                       |
|                             | 11                                                                                                                           | Investments—land, buildings, and equipment: basis ▶ _____<br>Less: accumulated depreciation (attach schedule) ▶ _____             | 266,667                                                                                                              |                                                                                         |                |                       |
|                             | 12                                                                                                                           | Investments—mortgage loans . . . . .                                                                                              |                                                                                                                      |                                                                                         |                |                       |
|                             | 13                                                                                                                           | Investments—other (attach schedule) . . . . .                                                                                     | 215,264                                                                                                              | 0                                                                                       | 0              |                       |
|                             | 14                                                                                                                           | Land, buildings, and equipment: basis ▶ _____<br>Less: accumulated depreciation (attach schedule) ▶ _____                         |                                                                                                                      |                                                                                         |                |                       |
| 15                          | Other assets (describe ▶ _____)                                                                                              |  103,501                                       |  0                              |  0 |                |                       |
| 16                          | Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)                                  | 12,911,321                                                                                                                        | 0                                                                                                                    | 0                                                                                       |                |                       |
| Liabilities                 | 17                                                                                                                           | Accounts payable and accrued expenses . . . . .                                                                                   | 90,000                                                                                                               |                                                                                         |                |                       |
|                             | 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). . . . .                                                                              | 90,000                                                                                                               | 0                                                                                       |                |                       |
| Net Assets or Fund Balances | Foundations that follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30. |                                                                                                                                   |                                                                                                                      |                                                                                         |                |                       |
|                             | 24                                                                                                                           | Net assets without donor restrictions . . . . .                                                                                   | 12,821,321                                                                                                           | 0                                                                                       |                |                       |
|                             | 25                                                                                                                           | Net assets with donor restrictions . . . . .                                                                                      |                                                                                                                      |                                                                                         |                |                       |
|                             | Foundations that do not follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 26 through 30.         |                                                                                                                                   |                                                                                                                      |                                                                                         |                |                       |
|                             | 26                                                                                                                           | Capital stock, trust principal, or current funds . . . . .                                                                        |                                                                                                                      |                                                                                         |                |                       |
|                             | 27                                                                                                                           | Paid-in or capital surplus, or land, bldg., and equipment fund                                                                    |                                                                                                                      |                                                                                         |                |                       |
|                             | 28                                                                                                                           | Retained earnings, accumulated income, endowment, or other funds                                                                  |                                                                                                                      |                                                                                         |                |                       |
|                             | 29                                                                                                                           | Total net assets or fund balances (see instructions) . . . . .                                                                    | 12,821,321                                                                                                           | 0                                                                                       |                |                       |
| 30                          | Total liabilities and net assets/fund balances (see instructions) .                                                          | 12,911,321                                                                                                                        | 0                                                                                                                    |                                                                                         |                |                       |

| 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 | 12,821,321  |
| 2                                                           | Enter amount from Part I, line 27a . . . . .                                                                                                                       | 2 | -10,590,634 |
| 3                                                           | Other increases not included in line 2 (itemize) ▶ _____                                                                                                           | 3 | 0           |
| 4                                                           | Add lines 1, 2, and 3 . . . . .                                                                                                                                    | 4 | 2,230,687   |
| 5                                                           | Decreases not included in line 2 (itemize) ▶ _____                             | 5 | 2,230,687   |
| 6                                                           | Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.                                                               | 6 | 0           |

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)<br>How acquired<br>P—Purchase<br>D—Donation | (c)<br>Date acquired<br>(mo., day, yr.) | (d)<br>Date sold<br>(mo., day, yr.) |
|------------------------------------------------------------------------------------------------------------------------------------|--|-------------------------------------------------|-----------------------------------------|-------------------------------------|
| 1 a Publicly Traded Securities                                                                                                     |  |                                                 |                                         |                                     |
| b Loss on real estate                                                                                                              |  | P                                               |                                         |                                     |
| c Art Object Disposition/Write-Offs                                                                                                |  | P                                               |                                         |                                     |
| d                                                                                                                                  |  |                                                 |                                         |                                     |
| e                                                                                                                                  |  |                                                 |                                         |                                     |

| (e)<br>Gross sales price | (f)<br>Depreciation allowed<br>(or allowable) | (g)<br>Cost or other basis<br>plus expense of sale | (h)<br>Gain or (loss)<br>(e) plus (f) minus (g) |
|--------------------------|-----------------------------------------------|----------------------------------------------------|-------------------------------------------------|
| a 10,417,821             |                                               | 5,145,833                                          | 5,271,988                                       |
| b 500,000                |                                               | 269,703                                            | 230,297                                         |
| c 144,640                |                                               | 129,657                                            | 14,983                                          |
| d                        |                                               |                                                    |                                                 |
| e                        |                                               |                                                    |                                                 |

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

| (i)<br>F.M.V. as of 12/31/69 | (j)<br>Adjusted basis<br>as of 12/31/69 | (k)<br>Excess of col. (i)<br>over col. (j), if any | (l)<br>Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col.(h)) |
|------------------------------|-----------------------------------------|----------------------------------------------------|---------------------------------------------------------------------------------------------------|
| a                            |                                         |                                                    | 5,271,988                                                                                         |
| b                            |                                         |                                                    | 230,297                                                                                           |
| c                            |                                         |                                                    | 14,983                                                                                            |
| d                            |                                         |                                                    |                                                                                                   |
| e                            |                                         |                                                    |                                                                                                   |

2 Capital gain net income or (net capital loss)

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):  
If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8

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

2

3

5,517,268

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 <input type="checkbox"/> and enter "N/A" on line 1.              |          |        |        |
| Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)                                                |          | 1      | 80,246 |
| 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      | 80,246 |
| 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      | 80,246 |
| 6 Credits/Payments:                                                                                                                          |          |        |        |
| a 2024 estimated tax payments and 2023 overpayment credited to 2024                                                                          | 6a       | 2,965  |        |
| b Exempt foreign organizations—tax withheld at source                                                                                        | 6b       | 0      |        |
| c Tax paid with application for extension of time to file (Form 8868)                                                                        | 6c       | 80,000 |        |
| d Backup withholding erroneously withheld                                                                                                    | 6d       | 0      |        |
| 7 Total credits and payments. Add lines 6a through 6d                                                                                        | 7        | 82,965 |        |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached.              | 8        | 4,183  |        |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed                                                              | 9        | 1,464  |        |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.                                                | 10       |        |        |
| 11 Enter the amount of line 10 to be: Credited to 2025 estimated tax                                                                         | Refunded | 11     | 0      |

Part VI-A

Statements Regarding Activities

|    |                                                                                                                                                                                                                                                                                                                                    |    |     |    |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|-----|----|
| 1a | During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?                                                                                                                                                               |    | Yes | No |
| 1a |                                                                                                                                                                                                                                                                                                                                    |    |     | No |
| b  | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.                                                                                                                                                                                      |    |     | No |
|    | <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>                                                                                                                               |    |     |    |
| c  | Did the foundation file <b>Form 1120-POL</b> for this year?                                                                                                                                                                                                                                                                        | 1c |     | No |
| d  | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(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? <i>If "Yes," attach a detailed description of the activities.</i>                                                                                                                                                                  | 2  |     | No |
| 3  | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>                                                                                                  | 3  |     | No |
| 4a | Did the foundation have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                                                                                                                        | 4a |     | No |
| b  | If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?                                                                                                                                                                                                                                                            | 4b |     |    |
| 5  | Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>                                                                                                                                                            | 5  | Yes |    |
| 6  | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<br>• By language in the governing instrument, or<br>• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? | 6  | Yes |    |
| 7  | Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>                                                                                                                                                                                         | 7  | Yes |    |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions)<br>FL                                                                                                                                                                                                                           |    |     |    |
| b  | If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>                                                                                                                 | 8b | Yes |    |
| 9  | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2024 or the taxable year beginning in 2024? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>                                                                   | 9  |     | No |
| 10 | Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>                                                                                                                                                                                         | 10 |     | No |
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," attach schedule. See instructions.</i>                                                                                                                                     | 11 | Yes |    |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i>                                                                                                                                     | 12 |     | No |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A                                                                                                                                                                                            | 13 | Yes |    |
| 14 | The books are in care of Gregory Thornton Controller Telephone no. (305) 559-2991<br>Located at 1515 US HWY 1 202 SEBASTIAN FL 32958 ZIP+4                                                                                                                                                                                         |    |     |    |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —check here and enter the amount of tax-exempt interest received or accrued during the year 15                                                                                                                                       |    |     |    |
| 16 | At any time during calendar year 2024, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. <i>If "Yes", enter the name of the foreign country</i>  | 16 | Yes | No |

**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 |
|--------------|-----|----|
| <b>1a(1)</b> |     | No |
| <b>1a(2)</b> |     | No |
| <b>1a(3)</b> | Yes |    |
| <b>1a(4)</b> | Yes |    |
| <b>1a(5)</b> |     | No |
| <b>1a(6)</b> |     | No |
| <b>1b</b>    |     | No |
| <b>1d</b>    |     | No |
| <b>2a</b>    |     | No |
| <b>2b</b>    |     |    |
| <b>3a</b>    |     | No |
| <b>3b</b>    |     |    |
| <b>4a</b>    |     | No |
| <b>4b</b>    |     | No |

Part VI-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

- 5a During the year did the foundation pay or incur any amount to:
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

5a(1)

No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

5a(2)

No
- (3) Provide a grant to an individual for travel, study, or other similar purposes?

5a(3)

No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

5a(4)

No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

5a(5)

No
- b If any answer is "Yes" to 5a(1)–(5); did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions
- 5b
- 
- c Organizations relying on a current notice regarding disaster assistance check
- 
- 
- d If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?
- 5d
- 
- If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
- 6a
- No
- b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
- 6b
- No
- If "Yes" to 6b, file Form 8870.
- 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?
- 7a
- No
- b If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
- 7b
- 
- 8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?
- 8
- No

Part VII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation. See instructions

| (a) Name and address                                    | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---------------------------------------------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| Sue Van<br>790 NW 107th Ave 215<br>Miami, FL 33172      | President, CEO<br>40.00                                   | 0                                         | 0                                                                     | 0                                     |
| Wayne Barlin<br>790 NW 107th Ave 215<br>Miami, FL 33172 | V. Pres., General Counsel<br>40.00                        | 0                                         | 0                                                                     | 0                                     |
| Susan Racher<br>790 NW 107th Ave 215<br>Miami, FL 33172 | V. Pres., CFO<br>40.00                                    | 0                                         | 0                                                                     | 0                                     |
| Susie Sands<br>790 NW 107th Ave 215<br>Miami, FL 33172  | V. Pres., Asian Programs<br>40.00                         | 0                                         | 0                                                                     | 0                                     |

2

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

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---------------------------------------------------------------|-----------------------------------------------------------|------------------|-----------------------------------------------------------------------|---------------------------------------|
| NONE                                                          |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |

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

0

Part VII

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

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

| (a) Name and address of each person paid more than \$50,000             | (b) Type of service | (c) Compensation |
|-------------------------------------------------------------------------|---------------------|------------------|
| Deloitte & Touche LLP<br>333 SE 2nd Avenue Suite 3600<br>Miami,FL 33131 | Audit               | 81,500           |
|                                                                         |                     |                  |
|                                                                         |                     |                  |
|                                                                         |                     |                  |
|                                                                         |                     |                  |
|                                                                         |                     |                  |
|                                                                         |                     |                  |
|                                                                         |                     |                  |

**Total** number of others receiving over \$50,000 for professional services. . . . . 0

Part VIII- Summary of Direct Charitable Activities

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

|   | Expenses |
|---|----------|
| 1 |          |
|   |          |
|   |          |
| 2 |          |
|   |          |
|   |          |
| 3 |          |
|   |          |
|   |          |
| 4 |          |
|   |          |
|   |          |

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

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

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

|          |                                                                                                                          |           |           |
|----------|--------------------------------------------------------------------------------------------------------------------------|-----------|-----------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:              |           |           |
| <b>a</b> | Average monthly fair market value of securities. . . . .                                                                 | <b>1a</b> | 1,552,823 |
| <b>b</b> | Average of monthly cash balances. . . . .                                                                                | <b>1b</b> | 4,773,741 |
| <b>c</b> | Fair market value of all other assets (see instructions). . . . .                                                        | <b>1c</b> | 0         |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c). . . . .                                                                           | <b>1d</b> | 6,326,564 |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .       | <b>1e</b> | 0         |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets                                                                     | <b>2</b>  | 0         |
| <b>3</b> | Subtract line 2 from line 1d. . . . .                                                                                    | <b>3</b>  | 6,326,564 |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions). . . . . | <b>4</b>  | 94,898    |
| <b>5</b> | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3.. . . .                                        | <b>5</b>  | 6,231,666 |
| <b>6</b> | <b>Minimum investment return.</b> Enter 5% (0.05) of line 5. . . . .                                                     | <b>6</b>  | 311,583   |

**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.)

|           |                                                                                                                   |           |         |
|-----------|-------------------------------------------------------------------------------------------------------------------|-----------|---------|
| <b>1</b>  | Minimum investment return from Part IX, line 6. . . . .                                                           | <b>1</b>  | 311,583 |
| <b>2a</b> | Tax on investment income for 2024 from Part V, line 5. . . . .                                                    | <b>2a</b> | 80,246  |
| <b>b</b>  | Income tax for 2024. (This does not include the tax from Part V.). . . . .                                        | <b>2b</b> |         |
| <b>c</b>  | Add lines 2a and 2b. . . . .                                                                                      | <b>2c</b> | 80,246  |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1. . . . .                                    | <b>3</b>  | 231,337 |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions. . . . .                                                | <b>4</b>  | 0       |
| <b>5</b>  | Add lines 3 and 4. . . . .                                                                                        | <b>5</b>  | 231,337 |
| <b>6</b>  | Deduction from distributable amount (see instructions). . . . .                                                   | <b>6</b>  | 0       |
| <b>7</b>  | <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1. . . . . | <b>7</b>  | 231,337 |

**Part XI Qualifying Distributions** (see instructions)

|          |                                                                                                                    |           |            |
|----------|--------------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:                         |           |            |
| <b>a</b> | Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26. . . . .                               | <b>1a</b> | 16,181,773 |
| <b>b</b> | Program-related investments—total from Part VIII-B                                                                 | <b>1b</b> | 0          |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . . | <b>2</b>  |            |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the:                                               |           |            |
| <b>a</b> | Suitability test (prior IRS approval required). . . . .                                                            | <b>3a</b> |            |
| <b>b</b> | Cash distribution test (attach the required schedule). . . . .                                                     | <b>3b</b> |            |
| <b>4</b> | <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .               | <b>4</b>  | 16,181,773 |

Part XII

Undistributed Income (see instructions)

|                                                                                                                                                                               | (a)<br>Corpus | (b)<br>Years prior to 2023 | (c)<br>2023 | (d)<br>2024 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2024 from Part X, line 7                                                                                                                           |               |                            |             | 231,337     |
| 2 Undistributed income, if any, as of the end of 2024:                                                                                                                        |               |                            |             |             |
| a Enter amount for 2023 only. . . . .                                                                                                                                         |               |                            | 0           |             |
| b Total for prior years: 20 ____ , 20____ , 20____                                                                                                                            |               | 0                          |             |             |
| 3 Excess distributions carryover, if any, to 2024:                                                                                                                            |               |                            |             |             |
| a From 2019. . . . .                                                                                                                                                          | 114,468       |                            |             |             |
| b From 2020. . . . .                                                                                                                                                          | 2,333,681     |                            |             |             |
| c From 2021. . . . .                                                                                                                                                          |               |                            |             |             |
| d From 2022. . . . .                                                                                                                                                          | 13,203,644    |                            |             |             |
| e From 2023. . . . .                                                                                                                                                          | 15,412,686    |                            |             |             |
| f Total of lines 3a through e. . . . .                                                                                                                                        | 31,064,479    |                            |             |             |
| 4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ 16,181,773                                                                                                     |               |                            |             |             |
| a Applied to 2023, but not more than line 2a                                                                                                                                  |               |                            | 0           |             |
| b Applied to undistributed income of prior years (Election required—see instructions). . . . .                                                                                |               | 0                          |             |             |
| c Treated as distributions out of corpus (Election required—see instructions). . . . .                                                                                        | 0             |                            |             |             |
| d Applied to 2024 distributable amount                                                                                                                                        |               |                            |             | 231,337     |
| e Remaining amount distributed out of corpus                                                                                                                                  | 15,950,436    |                            |             |             |
| 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                                                                                                                           | 47,014,915    |                            |             |             |
| 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). . . . . | 47,014,915    |                            |             |             |
| 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                                                                                                 | 0             |                            |             |             |
| 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                                                                                                                                                            |               |                            |             |             |



|                                                                                                                               |                                                                                                           |                                |                                  |                |
|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|----------------|
| Form 990-PF (2024)                                                                                                            |                                                                                                           |                                |                                  | Page <b>11</b> |
| <b>Part 3</b> <b>Supplementary Information (continued)</b>                                                                    |                                                                                                           |                                |                                  |                |
| <b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>                                         |                                                                                                           |                                |                                  |                |
| 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)                                                                                           |                                                                                                           |                                |                                  |                |
| <b>a</b> <i>Paid during the year</i>                                                                                          |                                                                                                           | P C                            | General Support                  | 250,350        |
| A Healthier Democracy Inc DBA Vot-ER<br>12 Mohawk St Unit 9<br>South Boston,MA 02127                                          |                                                                                                           |                                |                                  |                |
| Access Philanthropy Charities<br>2100 Stevens Avenue<br>Minneapolis,MN 55404                                                  |                                                                                                           | P C                            | General Support                  | 250,000        |
| America Votes Education Fund<br>1155 Connecticut Avenue NW<br>Washington,D.C 20036                                            |                                                                                                           | P C                            | General Support                  | 750,000        |
| Anti-Defamation League<br>605 Third Avenue<br>New York,NY 10158                                                               |                                                                                                           | P C                            | General Support                  | 1,000,000      |
| APANO Communities United Fund<br>8818 SE Division Street<br>Portland,OR 97206                                                 |                                                                                                           | P C                            | General Support                  | 201,250        |
| Asian & Pacific Islander American Vote<br>1612 K Street NW 600<br>Washington,D.C 20006                                        |                                                                                                           | P C                            | General Support                  | 1,001,300      |
| Asian American Community Fund of PennsylvaniaCenter for Empowered Politics<br>1042 Grant Ave Ste 5<br>San Francisco,CA 94133  |                                                                                                           | P C                            | General Support                  | 501,450        |
| Asian American Education Project<br>2089 Kenilworth Ave<br>Los Angeles,CA 90039                                               |                                                                                                           | P C                            | General Support                  | 350,750        |
| Asian American Federation<br>120 Wall St 9th Floor<br>New York,NY 10005                                                       |                                                                                                           | P C                            | General Support                  | 850            |
| Asian American Institute for Public Policy<br>110 W End Ave 3e<br>New York,NY 10023                                           |                                                                                                           | P C                            | General Support                  | 1,000          |
| Asian American Journalists Association<br>5 Third Street 1108<br>San Francisco,CA 94103                                       |                                                                                                           | P C                            | General Support                  | 400            |
| Asian American Legal Defense Education Fund<br>99 Hudson Street 12th Floor<br>New York,NY 10013                               |                                                                                                           | P C                            | General Support                  | 850            |
| Asian American Pacific Community Health Organizations<br>101 Callan Avenue Suite 400<br>San Leandro,CA 94577                  |                                                                                                           | P C                            | General Support                  | 1,000          |
| Asian American Pacific Islanders in Philanthropy<br>2201 Broadway Suite 720<br>Oakland,CA 94612                               |                                                                                                           | P C                            | General Support                  | 450            |
| Asian American Power Network Education FundCenter for Empowered Politics Ed<br>1042 Grant Ave Ste 5<br>San Francisco,CA 94133 |                                                                                                           | P C                            | General Support                  | 500,750        |
| Asian Americans Advancing Justice-AAJC<br>1620 L Street NW Suite 1050<br>Washington,D.C 20036                                 |                                                                                                           | P C                            | General Support                  | 600            |
| Asian Americans Advancing Justice-Asian Law Caucus<br>55 Columbus Av<br>San Francisco,CA 94111                                |                                                                                                           | P C                            | General Support                  | 380            |
| Asian Americans Advancing Justice-Atlanta<br>5680 Oakbrook Parkway Suite 148<br>Norcross,GA 30093                             |                                                                                                           | P C                            | General Support                  | 300,650        |
| Asian Americans Advancing Justice-Chicago<br>4753 N Broadway Suite 502<br>Chicago,IL 60640                                    |                                                                                                           | P C                            | General Support                  | 201,200        |
| Asian Americans United<br>1023 Callowhill Street<br>Philadelphia,PA 19123                                                     |                                                                                                           | P C                            | General Support                  | 300            |
| Asian and Pacific Islander American Vote - Michigan<br>POBox 12398<br>Hamtramck,MI 48212                                      |                                                                                                           | P C                            | General Support                  | 250,000        |
| Asian and Pacific Islander American Vote - Michigan<br>POBox 12398<br>Hamtramck,MI 48212                                      |                                                                                                           | P C                            | General Support                  | 250,000        |
| Asian Community Development Council<br>10275 Rainbow Boulevard Suite 253<br>Las Vegas,NV 89145                                |                                                                                                           | P C                            | General Support                  | 515,500        |
| Asian Counseling and Referral Services<br>3639 Martin Luther King Jr Way S<br>Seattle,WA 98144                                |                                                                                                           | P C                            | General Support                  | 550            |
| Asian Health Services<br>101 8th Street Suite 100<br>Oakland,CA 94607                                                         |                                                                                                           | P C                            | General Support                  | 3,750          |
| Asian Pacific Environmental Network<br>426 17th Street Suite 500<br>Oakland,CA 94612                                          |                                                                                                           | P C                            | General Support                  | 750            |
| Asian Pacific Fund<br>465 California Street Suite 700<br>San Francisco,CA 94104                                               |                                                                                                           | P C                            | General Support                  | 1,500          |
| Asian Pacific Institute for Congressional Studies<br>1001 Connecticut Ave NW Suite 320<br>Washington,D.C 20036                |                                                                                                           | P C                            | General Support                  | 150,850        |
| Asian Pacific Institute on Gender-Based Violence<br>500 12th Street Suite 330<br>Oakland,CA 94607                             |                                                                                                           | P C                            | General Support                  | 51,450         |
| Asian Pacific Islander American Health Forum<br>461 Bush St Ste 400<br>San Francisco,CA 94108                                 |                                                                                                           | P C                            | General Support                  | 650            |
| Aurora Mental Health & Recovery<br>11059 E Bethany Dr<br>Aurora,CO 80014                                                      |                                                                                                           | P C                            | General Support                  | 250            |
| CAPI USA<br>5930 Brooklyn Boulevard<br>Minneapolis,MN 55429                                                                   |                                                                                                           | P C                            | General Support                  | 176,000        |
| Center for Asian American Media<br>145 Ninth Street Suite 350<br>San Francisco,CA 94103                                       |                                                                                                           | P C                            | General Support                  | 100,650        |
| Center for Asian American Media<br>145 Ninth Street Suite 350<br>San Francisco,CA 94103                                       |                                                                                                           | P C                            | General Support                  | 100,000        |
| Center for Empowered Politics Education Fund<br>1042 Grant Ave Ste 5<br>San Francisco,CA 94133                                |                                                                                                           | P C                            | General Support                  | 501,000        |
| Center for Secure and Modern ElectionsNew Venture Fund<br>1828 L Street NW Suite 300-A<br>Washington,D.C 20036                |                                                                                                           | P C                            | General Support                  | 1,500          |
| Center on Civic Engagement<br>1825 K Street NW Suite 450<br>Washington,D.C 20006                                              |                                                                                                           | P C                            | General Support                  | 301,400        |
| Chinatown Progressive Association aka Chinese Progressive Association Bosto<br>28 Ash Street<br>Boston,MA 02111               |                                                                                                           | P C                            | General Support                  | 202,000        |
| Chinese Progressive Association San Francisco<br>1042 Grant Ave 5th Floor<br>San Francisco,CA 94133                           |                                                                                                           | P C                            | General Support                  | 750            |
| Community Partners<br>1000 North Alameda Street Suite 240<br>Los Angeles,CA 90012                                             |                                                                                                           | P C                            | General Support                  | 250,550        |
| Council for Native Hawaiian Advancement<br>91-1270 Kimoiki Street Bldg 1<br>Kapolei,HI 96707                                  |                                                                                                           | P C                            | General Support                  | 3,000          |
| Drexel University<br>3141 Chestnut St 7-718<br>Philadelphia,PA 19104                                                          |                                                                                                           | P C                            | General Support                  | 500,000        |
| Every Voice Texas dba Asian Texans for Justice<br>13010 N Highway 183 Suite 201<br>Austin,TX 78750                            |                                                                                                           | P C                            | General Support                  | 301,000        |
| Fair Elections Center<br>1825 K Street NW Suite 450<br>Washington,D.C 20006                                                   |                                                                                                           | P C                            | General Support                  | 75,000         |
| Florida Philanthropic Network Inc<br>5421 Beaumont Center Blvd 655<br>Tampa,FL 33634                                          |                                                                                                           | P C                            | General Support                  | 100,000        |
| Florida Taxwatch Inc<br>106 N Bronough St<br>Tallahassee,FL 32301                                                             |                                                                                                           | P C                            | General Support                  | 100,000        |
| Fred Korematsu Institute<br>PO Box 29527<br>San Francisco,CA 94129                                                            |                                                                                                           | P C                            | General Support                  | 1,750          |
| Freedom Inc<br>2030 South Park Street<br>Madison,WI 53713                                                                     |                                                                                                           | P C                            | General Support                  | 451,250        |
| Georgia Tech<br>A French Building Room 213 237<br>Uncle Henrie Way<br>Atlanta,GA 30332                                        |                                                                                                           | P C                            | General Support                  | 350            |
| IAPALA<br>815 16th Street NW 2nd Floor<br>Washington,D.C 20006                                                                |                                                                                                           | P C                            | General Support                  | 350            |
| Illinois Coalition For Immigrant and Refugee Rights<br>228 S Wabash Avenue Suite 800<br>Chicago,IL 60604                      |                                                                                                           | P C                            | General Support                  | 201,750        |
| Illinois Coalition For Immigrant and Refugee Rights<br>228 S Wabash Avenue Suite 800<br>Chicago,IL 60604                      |                                                                                                           | P C                            | General Support                  | 150,000        |
| Immigrant Legal Resource Center<br>1458 Howard Street<br>San Francisco,CA 94103                                               |                                                                                                           | P C                            | General Support                  | 1,100          |
| Minkwon Center for Community Action Inc<br>133-29 42st Avenue 202<br>Flushing,NY 11355                                        |                                                                                                           | P C                            | General Support                  | 151,150        |
| Naeva<br>7906 Menaul Blvd NE<br>Albuquerque,NM 87110                                                                          |                                                                                                           | P C                            | General Support                  | 250,000        |
| NAMI - Miami Dade<br>299 Alhambra Circle Suite 224<br>Coral Gables,FL 33134                                                   |                                                                                                           | P C                            | General Support                  | 750            |
| National Congress of American Indians Fund<br>1516 P St NW<br>Washington,D.C 20005                                            |                                                                                                           | P C                            | General Support                  | 250,000        |
| National Partnership for New Americans<br>1805 S Ashland Avenue<br>Chicago,IL 60608                                           |                                                                                                           | P C                            | General Support                  | 303,750        |
| National Tongan American Society<br>5296 S Commerce Drive 204<br>Murray,UT 84107                                              |                                                                                                           | P C                            | General Support                  | 176,000        |
| Native American Rights Fund<br>250 Arapahoe Avenue<br>Boulder,CO 80302                                                        |                                                                                                           | P C                            | General Support                  | 250,000        |
| NeighborWorks America<br>8484 Georgia Ave Suite 330<br>Silver Spring,MD 20910                                                 |                                                                                                           | P C                            | General Support                  | 750            |
| Neo Philanthropy Inc<br>1001 Avenue of the Americas<br>New York,NY 10018                                                      |                                                                                                           | P C                            | General Support                  | 301,260        |
| New American Leaders<br>530 7th Avenue<br>New York,NY 10018                                                                   |                                                                                                           | P C                            | General Support                  | 500            |
| New Venture Fund<br>1828 L Street NW Suite 300-A<br>Washington,D.C 20036                                                      |                                                                                                           | P C                            | General Support                  | 950            |
| New Virginia Majority Education Fund<br>3801 Mount Vernon Ave<br>Alexandria,VA 22305                                          |                                                                                                           | P C                            | General Support                  | 500,000        |
| New York Immigration Coalition<br>131 West 33rd St Suite 610<br>New York,NY 10001                                             |                                                                                                           | P C                            | General Support                  | 850            |
| Nonprofit VOTE Inc<br>125 Cambridgepark Drive<br>Cambridge,MA 02140                                                           |                                                                                                           | P C                            | General Support                  | 75,000         |
| North Carolina Asian Americans Together<br>711 Hillsborough Street Suite 102<br>Raleigh,NC 27603                              |                                                                                                           | P C                            | General Support                  | 500,000        |
| Northeast Medical Services<br>2171 Junipero Serra Blvd 700<br>Daly City,CA 94014                                              |                                                                                                           | P C                            | General Support                  | 60,500         |
| Ohio Voice<br>PO Box 428<br>Columbus,OH 43216                                                                                 |                                                                                                           | P C                            | General Support                  | 150,000        |
| One Arizona<br>3104 E Camelback Road<br>Phoenix,AZ 85016                                                                      |                                                                                                           | P C                            | General Support                  | 250,750        |
| Orange County Asian and Pacific Islander Community Alliance<br>12912 Brookhurst Street Suite 410<br>Garden Grove,CA 92840     |                                                                                                           | P C                            | General Support                  | 101,500        |
| Organization of Chinese Americans<br>711 Hillsborough Street Suite 102<br>Raleigh,NC 27603                                    |                                                                                                           | P C                            | General Support                  | 550            |
| Organization of Chinese Americans of Greater Houston<br>9800 Town Park Suite 142<br>Houston,TX 77036                          |                                                                                                           | P C                            | General Support                  | 300,000        |
| Pew Research Center<br>901 E Street NW 300<br>Washington,D.C 20004                                                            |                                                                                                           | P C                            | General Support                  | 1,000          |
| Rising Voices FundCenter for Empowered Politics Education Fund<br>1042 Grant Ave Ste 5<br>San Francisco,CA 94133              |                                                                                                           | P C                            | General Support                  | 250,550        |
| Sacred Pipe Resource Center<br>925 Basin Avenue Suite2<br>Bismarck,ND 58504                                                   |                                                                                                           | P C                            | General Support                  | 100,000        |
| Santa Clara County Asian Law Alliance Inc<br>991 West Hedding Street Suite 202<br>San Jose,CA 95126                           |                                                                                                           | P C                            | General Support                  | 100,500        |
| Sikh American Legal Defense and Education Fund Inc<br>1612 K Street NW Suite 600<br>Washington,D.C 20006                      |                                                                                                           | P C                            | General Support                  | 250,900        |
| Southeast Asian Mutual Assistance Associations Coalition Inc<br>1711 S Broad Street 2nd Floor<br>Philadelphia,PA 19148        |                                                                                                           | P C                            | General Support                  | 251,250        |
| State Voices<br>1616 P Street NW Suite 220<br>Washington,D.C 20036                                                            |                                                                                                           | P C                            | General Support                  | 250,000        |
| Tennessee Immigrant & Refugee Rights Coalition<br>3310 Ezell Road<br>Nashville,TN 37211                                       |                                                                                                           | P C                            | General Support                  | 100,700        |
| The Asian American Foundation<br>PO Box 21749<br>Washington,D.C 20009                                                         |                                                                                                           | P C                            | General Support                  | 1,000          |
| Tides Center<br>1012 Torney Ave<br>San Francisco,CA 94129                                                                     |                                                                                                           | P C                            | General Support                  | 250,000        |
| University of California Berkeley<br>1995 University Ave<br>Berkeley,CA 94704                                                 |                                                                                                           | P C                            | General Support                  | 650            |
| University of California San Diego<br>5998 Alcala Park<br>San Diego,CA 92110                                                  |                                                                                                           | P C                            | General Support                  | 750            |
| US-Japan Council<br>1819 L St NW Ste 200<br>Washington,D.C 20036                                                              |                                                                                                           | P C                            | General Support                  | 1,000          |
| Western Native Voice Education Project<br>80 25th Street W<br>Billings,MT 59102                                               |                                                                                                           | P C                            | General Support                  | 250,000        |
| Western Native Voice Education Project<br>80 25th Street W<br>Billings,MT 59102                                               |                                                                                                           | P C                            | General Support                  | 250,000        |
| Western Organization of Resource Councils Education Project<br>220 S 27th Street B<br>Billings,MT 59101                       |                                                                                                           | P C                            | General Support                  | 125,000        |
| <b>Total</b>                                                                                                                  |                                                                                                           |                                | <b>3a</b>                        | 15,865,740     |
| <b>b</b> <i>Approved for future payment</i>                                                                                   |                                                                                                           |                                |                                  |                |
| <b>Total</b>                                                                                                                  |                                                                                                           |                                | <b>3b</b>                        |                |

| Unrelated business income                                                      |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income<br>(See<br>instructions.) |
|--------------------------------------------------------------------------------|---------------|--------------------------------------|---------------|-----------------------------------------------------------------------|
| (a)<br>Business<br>code                                                        | (b)<br>Amount | (c)<br>Exclusion code                | (d)<br>Amount |                                                                       |
| Enter gross amounts unless otherwise indicated.                                |               |                                      |               |                                                                       |
| <b>1</b> Program service revenue:                                              |               |                                      |               |                                                                       |
| a _____                                                                        |               |                                      |               |                                                                       |
| b _____                                                                        |               |                                      |               |                                                                       |
| c _____                                                                        |               |                                      |               |                                                                       |
| d _____                                                                        |               |                                      |               |                                                                       |
| e _____                                                                        |               |                                      |               |                                                                       |
| f _____                                                                        |               |                                      |               |                                                                       |
| g Fees and contracts from government agencies                                  |               |                                      |               |                                                                       |
| <b>2</b> Membership dues and assessments . . . .                               |               |                                      |               |                                                                       |
| <b>3</b> Interest on savings and temporary cash<br>investments . . . . .       |               |                                      |               |                                                                       |
|                                                                                |               | 14                                   | 198,640       |                                                                       |
| <b>4</b> Dividends and interest from securities<br>. . . .                     |               |                                      |               |                                                                       |
|                                                                                |               | 14                                   | 64,139        |                                                                       |
| <b>5</b> Net rental income or (loss) from real estate:                         |               |                                      |               |                                                                       |
| a Debt-financed property. . . . .                                              |               |                                      |               |                                                                       |
| b Not debt-financed property. . . . .                                          |               |                                      |               |                                                                       |
| <b>6</b> Net rental income or (loss) from personal<br>property                 |               |                                      |               |                                                                       |
| <b>7</b> Other investment income . . . . .                                     |               |                                      |               |                                                                       |
| <b>8</b> Gain or (loss) from sales of assets other than<br>inventory . . . . . |               |                                      |               |                                                                       |
|                                                                                |               | 18                                   | 8,669         |                                                                       |
| <b>9</b> Net income or (loss) from special events:                             |               |                                      |               |                                                                       |
| <b>10</b> Gross profit or (loss) from sales of inventory                       |               |                                      |               |                                                                       |
| <b>11</b> Other revenue:                                                       |               |                                      |               |                                                                       |
| a _____                                                                        |               |                                      |               |                                                                       |
| b _____                                                                        |               |                                      |               |                                                                       |
| c _____                                                                        |               |                                      |               |                                                                       |
| d _____                                                                        |               |                                      |               |                                                                       |
| e _____                                                                        |               |                                      |               |                                                                       |
| <b>12</b> Subtotal. Add columns (b), (d), and (e) . . . .                      |               |                                      |               |                                                                       |
|                                                                                | 0             |                                      | 5,777,095     | 0                                                                     |
| <b>13</b> <b>Total.</b> Add line 12, columns (b), (d), and (e). . . . .        |               |                                      |               |                                                                       |
| (See worksheet in line 13 instructions to verify calculations.)                |               |                                      |               |                                                                       |
|                                                                                |               | 13                                   | 5,777,095     | 5,777,095                                                             |

[illegible]

## Part XVI

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

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

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

(1) Cash. . . . .

(2) Other assets. . . . .

**b** Other transactions:

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

**(2) Purchases of assets from a noncharitable exempt organization**

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

(4) Reimbursement arrangements. . . . .

(5) Loans or loan guarantees. . . .

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

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

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

[illegible]

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

**b** If "Yes," complete the following schedule.

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

## Sign Here

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

2025-11-16

Signature of officer or trustee

Date \_\_\_\_\_

Title

May the IRS discuss this return with the preparer shown below?

See instructions. ☐ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's Signature

Date \_\_\_\_\_

Check if self-employed ☐

PTIN

P00143920

Firm's name ► Deloitte Tax LLP

Firm's EIN ►86-106577

Firm's address ► 50 South Sixth Street  
Minneapolis, MN 55402

Phone no.  
(612) 397-4000

**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:** Wallace H Coulter Trust

**EIN:** 65-6310670

| Category   | Amount | Net Investment<br>Income | Adjusted Net<br>Income | Disbursements<br>for Charitable<br>Purposes |
|------------|--------|--------------------------|------------------------|---------------------------------------------|
| AUDIT FEES | 81,500 | 0                        |                        | 81,500                                      |
| TAX FEES   | 14,385 | 0                        |                        | 14,385                                      |

TY 2024 IRS 990 e-File Render

Name: Wallace H Coulter Trust

EIN: 65-6310670

| Dissolution Name         | Dissolution Address                  | Explanation                                                                                                                                                                                                                                                                                          | Dissolution Amount |
|--------------------------|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| SEE PART XIV GRANTS PAID | 1515 US HWY 1<br>SEBASTIAN, FL 32958 | ALL TRANSFERRED ASSETS AND EXCESS DISTRIBUTION CARRYOVERS WERE ALLOCATED TO THE WALLACE H. COULTER FOUNDATION (EIN: 31-1546126) BY THE END OF 2024. THE FAIR MARKET VALUE OF THESE ASSETS WAS REPORTED IN PART III. THE ORGANIZATION TERMINATED ITS PRIVATE FOUNDATION STATUS AS OF THE END OF 2024. | 2,230,687          |

## TY 2024 IRS 990 e-File Render

**Name:** Wallace H Coulter Trust

**EIN:** 65-6310670

| Identifier                             | Return Reference                  | Explanation                                                                                                                                                                                                                                                                              |
|----------------------------------------|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| STATEMENT OF CONTROLLED ENTITIES       | FORM 990-PF<br>PART VI-A, LINE 11 | NAME OF CONTROLLED ENTITY: WALLACE H. COULTER FOUNDATIONEMPLOYER ID NO: 31-1546126ADDRESS: 1515 U.S. HWY 1, 202, SEBASTIAN, FL, 32958EXCESS BUSINESS HOLDING: NOALL ASSETS WERE TRANSFERRED TO A CONTROLLED ENTITY, WHICH IS A PRIVATE FOUNDATION, PURSUANT TO IRC SECTION 507(b)(1)(A). |
| Supplemental Disclosure to Form 990-PF | SUPPLEMENTAL DISCLOSURE           | For the tax year ended December 31, 2024, the Foundation's net unrealized gains on investments per books in the amount of \$4,991,904 are not included on Page 1, Part I, column (a).                                                                                                    |

## TY 2024 IRS 990 e-File Render

**Name:** Wallace H Coulter Trust

**EIN:** 65-6310670

**Statement:** ALL TRANSFERRED ASSETS AND EXCESS DISTRIBUTION CARRYOVERS WERE ALLOCATED TO THE WALLACE H. COULTER FOUNDATION (EIN: 31-1546126) BY THE END OF 2024. THE FAIR MARKET VALUE OF THESE ASSETS WAS REPORTED IN PART III. THE ORGANIZATION TERMINATED ITS PRIVATE FOUNDATION STATUS AS OF THE END OF 2024.

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

**Name:** Wallace H Coulter Trust

**EIN:** 65-6310670

| Description                       | Beginning of Year - Book Value | End of Year - Book Value | End of Year - Fair Market Value |
|-----------------------------------|--------------------------------|--------------------------|---------------------------------|
| INTEREST AND DIVIDENDS RECEIVABLE | 12,553                         |                          | 0                               |
| FEDERAL EXCISE TAX PAYABLE        | 90,948                         |                          | 0                               |

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

**Name:** Wallace H Coulter Trust

**EIN:** 65-6310670

| Description                                        | Amount    |
|----------------------------------------------------|-----------|
| 507(b)(2) TRANSFER TO WALLACE H COULTER FOUNDATION | 2,230,687 |

TY 2024 IRS 990 e-File Render

**Name:** Wallace H Coulter Trust  
**EIN:** 65-6310670

| Description     | Revenue and Expenses per Books | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|-----------------|--------------------------------|-----------------------|---------------------|---------------------------------------|
| INSURANCE       | 3,252                          | 0                     |                     | 3,252                                 |
| INVESTMENT FEES | 191                            | 191                   |                     | 0                                     |

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

**Name:** Wallace H Coulter Trust

**EIN:** 65-6310670

| Description             | Revenue And<br>Expenses Per Books | Net Investment<br>Income | Adjusted Net<br>Income |
|-------------------------|-----------------------------------|--------------------------|------------------------|
| CLASS ACTION SETTLEMENT | 8,669                             | 8,669                    | 8,669                  |

## TY 2024 IRS 990 e-File Render

**Name:** Wallace H Coulter Trust

**EIN:** 65-6310670

| Category                  | Amount | Net Investment<br>Income | Adjusted Net<br>Income | Disbursements<br>for Charitable<br>Purposes |
|---------------------------|--------|--------------------------|------------------------|---------------------------------------------|
| SECURITIES MANAGEMENT     | 1,867  | 1,867                    |                        | 0                                           |
| SECURITIES CUSTODIAL FEES | 13,555 | 13,555                   |                        | 0                                           |
| GRANT CONSULTING          | 3,900  | 0                        |                        | 3,900                                       |

TY 2024 IRS 990 e-File Render

Name: Wallace H Coulter Trust

EIN: 65-6310670

| Category     | Amount  | Net Investment<br>Income | Adjusted Net<br>Income | Disbursements<br>for Charitable<br>Purposes |
|--------------|---------|--------------------------|------------------------|---------------------------------------------|
| EXCISE TAXES | 170,343 | 0                        |                        | 0                                           |