

or Section 4947(a)(1) Trust Treated as Private Foundation

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

Name of foundation: WAVERLEY STREET FOUNDATION. A Employer identification number: 81-3242506. B Telephone number: (650) 313-2002. C If exemption application is pending, check here. D 1. Foreign organizations, check here. D 2. Foreign organizations meeting the 85% test, check here and attach computation. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. H Check type of organization: Section 501(c)(3) exempt private foundation. J Accounting method: Cash. I Fair market value of all assets at end of year: \$3,338,124,885.

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include: 1 Contributions, gifts, grants, etc., received; 2 Check if the foundation is not required to attach Sch. B; 3 Interest on savings and temporary cash investments; 4 Dividends and interest from securities; 5a Gross rents; b Net rental income or (loss); 6a Net gain or (loss) from sale of assets not on line 10; b Gross sales price for all assets on line 6a; 7 Capital gain net income; 8 Net short-term capital gain; 9 Income modifications; 10a Gross sales less returns and allowances; b Less: Cost of goods sold; c Gross profit or (loss); 11 Other income; 12 Total. Add lines 1 through 11; 13 Compensation of officers, directors, trustees, etc.; 14 Other employee salaries and wages; 15 Pension plans, employee benefits; 16a Legal fees; b Accounting fees; c Other professional fees; 17 Interest; 18 Taxes; 19 Depreciation; 20 Occupancy; 21 Travel, conferences, and meetings; 22 Printing and publications; 23 Other expenses; 24 Total operating and administrative expenses; Add lines 13 through 23; 25 Contributions, gifts, grants paid; 26 Total expenses and disbursements; Add lines 24 and 25; 27 Subtract line 26 from line 12; a Excess of revenue over expenses and disbursements; b Net investment income; c Adjusted net income.

**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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	17,959,337	4,284,355	4,284,355
	<b>2</b> Savings and temporary cash investments . . . . .	156,157,198	116,401,629	116,401,629
	<b>3</b> Accounts receivable ▶ <u>4,986</u>			
	Less: allowance for doubtful accounts ▶ _____	73,064	4,986	4,986
	<b>4</b> Pledges receivable ▶ _____			
	Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____			
	Less: allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule) . . . . .			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	281,057,572	281,057,572	615,534,742
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	400,000,000	200,000,000	200,742,082
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ _____			
Less: accumulated depreciation (attach schedule) ▶ _____				
<b>12</b> Investments—mortgage loans . . . . .				
<b>13</b> Investments—other (attach schedule) . . . . .	1,927,760,912	2,130,422,496	2,395,143,197	
<b>14</b> Land, buildings, and equipment: basis ▶ _____				
Less: accumulated depreciation (attach schedule) ▶ _____				
<b>15</b> Other assets (describe ▶ _____)	961,710	6,002,688	6,013,894	
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,783,969,793	2,738,173,726	3,338,124,885	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue. . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons . . . . .			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/>			
	<b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .			
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input checked="" type="checkbox"/>			
	<b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .			
<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .				
<b>28</b> Retained earnings, accumulated income, endowment, or other funds . . . . .	2,783,969,793	2,738,173,726		
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	2,783,969,793	2,738,173,726		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	2,783,969,793	2,738,173,726		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	2,783,969,793
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-45,796,067
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	2,738,173,726
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 . . . . .	<b>6</b>	2,738,173,726

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Row 1a: PUBLICLY-TRADED SECURITIES.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Row a: 414,989,851; 414,987,111; 2,740.

Table with 4 columns: (i) F.M.V. as of 12/31/69, (j) Adjusted basis as of 12/31/69, (k) Excess of col. (i) over col. (j), (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)). Row a: 2,740.

Summary rows for capital gain net income (2) and net short-term capital gain or (loss) (3). Total values: 155,366,268.

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

Table for excise tax calculation. Rows 1a-11 include exemptions, tax payments, credits, and final tax due/overpayment. Total tax due: 3,702,884.

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?  . . . . .

**b** Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. . . . .  
*If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*

**c** Did the foundation file **Form 1120-POL** for this year? . . . . .

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

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

**2** Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .  
*If "Yes," attach a detailed description of the activities.*

**3** Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*  . . . . .

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

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

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

**6** Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  
 ● By language in the governing instrument, or  
 ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .

**7** Did the foundation have at least \$5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XIV.* . . . . .

**8a** Enter the states to which the foundation reports or with which it is registered (see instructions)  
 ▶ CA \_\_\_\_\_

**b** If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation .*

**9** Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2024 or the taxable year beginning in 2024? See the instructions for Part XIII. *If "Yes," complete Part XIII* . . . . .

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

**11** At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? *If "Yes," attach schedule. See instructions*  . . . . .

**12** Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? *If "Yes," attach statement. See instructions*  . . . . .

**13** Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ WWW.WAVERLEYSTREET.ORG

	Yes	No
<b>1a</b>		No
<b>1b</b>		No
<b>1c</b>		No
<b>2</b>		No
<b>3</b>	Yes	
<b>4a</b>	Yes	
<b>4b</b>	Yes	
<b>5</b>		No
<b>6</b>	Yes	
<b>7</b>	Yes	
<b>8b</b>	Yes	
<b>9</b>		No
<b>10</b>		No
<b>11</b>	Yes	
<b>12</b>	Yes	
<b>13</b>	Yes	

**14** The books are in care of ▶ ROSEWOOD FAMILY ADVISORS LLP Telephone no. ▶ (650) 313-2002  
 Located at ▶ PO BOX 61239 PALO ALTO CA ZIP+4 ▶ 94306

**15** Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —check here . . . . . ▶  
 and enter the amount of tax-exempt interest received or accrued during the year . . . . . **15**

**16** At any time during calendar year 2024, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . .  
 See the instructions for exceptions and filing requirements for FinCEN Form 114. *If "Yes", enter the name of the foreign country* ▶ LU

	Yes	No
<b>16</b>	Yes	

**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 exempted 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>	Yes	
<b>3b</b>		No
<b>4a</b>		No
<b>4b</b>		No

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

<b>5a</b>	During the year did the foundation pay or incur any amount to:		<b>Yes</b>	<b>No</b>
<b>(1)</b>	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<b>5a(1)</b>		<b>No</b>
<b>(2)</b>	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<b>5a(2)</b>		<b>No</b>
<b>(3)</b>	Provide a grant to an individual for travel, study, or other similar purposes?	<b>5a(3)</b>		<b>No</b>
<b>(4)</b>	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<b>5a(4)</b>	<b>Yes</b>	
<b>(5)</b>	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<b>5a(5)</b>		<b>No</b>
<b>b</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	<b>5b</b>		<b>No</b>
<b>c</b>	Organizations relying on a current notice regarding disaster assistance check			
<b>d</b>	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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	<b>5d</b>	<b>Yes</b>	
<b>6a</b>	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<b>6a</b>		<b>No</b>
<b>b</b>	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>	<b>6b</b>		<b>No</b>
<b>7a</b>	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<b>7a</b>		<b>No</b>
<b>b</b>	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	<b>7b</b>		
<b>8</b>	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?	<b>8</b>		<b>No</b>

**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
LAURENE POWELL JOBS 3000 EL CAMINO REAL PALO ALTO, CA 94306	VICE CHAIR/DIRECTOR 4.0	0	0	0
ANNE MARIE BURGOYNE 3000 EL CAMINO REAL PALO ALTO, CA 94306	TREASURER/SECRETARY/DIRECTOR 4.0	0	0	0
J BRADLEY POWELL 3000 EL CAMINO REAL PALO ALTO, CA 94306	DIRECTOR 4.0	0	0	0
REED JOBS 3000 EL CAMINO REAL PALO ALTO, CA 94306	DIRECTOR 4.0	0	0	0
MONA SIMPSON 3000 EL CAMINO REAL PALO ALTO, CA 94306	DIRECTOR 4.0	0	0	0
MICHAEL KLEIN 3000 EL CAMINO REAL PALO ALTO, CA 94306	DIRECTOR 4.0	0	0	0
LISA JACKSON 3000 EL CAMINO REAL PALO ALTO, CA 94306	CHAIR OF THE BOARD/Director 6.0	0	0	0
JARED BLUMENFELD 3000 EL CAMINO REAL PALO ALTO, CA 94306	PRESIDENT 40.0	920,193	20,700	0
JAGADHA SIVAN 3000 EL CAMINO REAL PALO ALTO, CA 94306	CHIEF OPERATING OFFICER 40.0	658,941	15,000	0
DARREN WALKER 3000 EL CAMINO REAL PALO ALTO, CA 94306	DIRECTOR 4.0	0	0	0
RAFAEL REIF 3000 EL CAMINO REAL PALO ALTO, CA 94306	DIRECTOR 4.0	0	0	0
RADHIKA FOX 3000 EL CAMINO REAL PALO ALTO, CA 94306	DIRECTOR 4.0	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
LANDE AJOSE PO BOX 61239 PALO ALTO, CA 94306	MANAGING DIRECTOR 40.0	600,000	20,700	0
EMILIANO MARTINEZ PO BOX 61239 PALO ALTO, CA 94306	GENERAL COUNSEL 40.0	541,667	13,833	0
KAI CARTER PO BOX 61239 PALO ALTO, CA 94306	HEAD OF GLOBAL PROG. 40.0	351,939	7,751	0
CAROLE EXCELL PO BOX 61239 PALO ALTO, CA 94306	SR. PROGRAM OFFICER 40.0	351,379	20,700	0
CARMELITA MITCHELL PO BOX 61239 PALO ALTO, CA 94306	DIRECTOR, GRANTS MGT 40.0	312,439	16,638	0

**Total** number of other employees paid over \$50,000. ▶ 19

**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
72ANDSUNNY PARTNERS LLC 12101 BLUFF CREEK DRIVE PLAYA VISTA, CA 90094	AGENCY	2,389,648
SUNSTONE STRATEGIES LLC 360 GRAND AVENUE 187 OAKLAND, CA 94610	STRATEGIC CONSULTING	1,501,654
OLMSTEAD PRODUCTIONS INC (E2K) 445 N WHISMAN ROAD STE 100 MOUNTAIN VIEW, CA 94043	VIDEO PRODUCTION	1,319,298
ROSEWOOD FAMILY ADVISORS LLP PO BOX 61239 PALO ALTO, CA 94306	ACCOUNTING & TAX	545,668
UPSTATEMENT 169 MADISON AVENUE 2030 NEW YORK, NY 10016	DESIGN	540,200

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

**Part VIII- Summary of Direct Charitable Activities**

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

	Expenses
1	
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 WPIF II MANAGER LLC COMMUNITY CLEAN ENERGY FUND INVESTMENT	5,000,000
2	
3 All other program-related investments. See instructions.	

**Total.** Add lines 1 through 3 . . . . . 5,000,000

**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>	833,569,083
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	150,184,330
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	2,410,677,722
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	3,394,431,135
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	
<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>	3,394,431,135
<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>	50,916,467
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. . . . .	<b>5</b>	3,343,514,668
<b>6</b>	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5. . . . .	<b>6</b>	167,175,733

**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>	167,175,733
<b>2a</b>	Tax on investment income for 2024 from Part V, line 5. . . . .	<b>2a</b>	3,756,495
<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>	3,756,495
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	163,419,238
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	163,419,238
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	
<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>	163,419,238

**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>	306,163,099
<b>b</b>	Program-related investments—total from Part VIII-B	<b>1b</b>	5,000,000
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	0
<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>	0
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	0
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4. . . . .	<b>4</b>	311,163,099

**Part XII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
<b>1</b> Distributable amount for 2024 from Part X, line 7				163,419,238
<b>2</b> Undistributed income, if any, as of the end of 2024:				
<b>a</b> Enter amount for 2023 only. . . . .			77,246,883	
<b>b</b> Total for prior years: 2022, 2021, 2020				
<b>3</b> Excess distributions carryover, if any, to 2024:				
<b>a</b> From 2019. . . . .				
<b>b</b> From 2020. . . . .				
<b>c</b> From 2021. . . . .				
<b>d</b> From 2022. . . . .				
<b>e</b> From 2023. . . . .				0
<b>f</b> <b>Total</b> of lines 3a through e. . . . .				0
<b>4</b> Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ <u>311,163,099</u>				
<b>a</b> Applied to 2023, but not more than line 2a			77,246,883	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .				
<b>d</b> Applied to 2024 distributable amount				163,419,238
<b>e</b> Remaining amount distributed out of corpus	70,496,978			
<b>5</b> Excess distributions carryover applied to 2024. (If an amount appears in column (d), the same amount must be shown in column (a).)				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	70,496,978			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b. . . . .				
<b>c</b> 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				
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions. . . . .				
<b>e</b> Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .				
<b>f</b> Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				0
<b>7</b> 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). . . . .				
<b>8</b> Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)				
<b>9</b> <b>Excess distributions carryover to 2025.</b> Subtract lines 7 and 8 from line 6a	70,496,978			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2020				
<b>b</b> Excess from 2021				
<b>c</b> Excess from 2022. . . . .				
<b>d</b> Excess from 2023				0
<b>e</b> Excess from 2024	70,496,978			

Part XIII Private Operating Foundations (see instructions and Part VI-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2024, enter the date of the ruling . . . . .

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

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

b 85% (0.85) of line 2a

c Qualifying distributions from Part XI, line 4 for each year listed . . . . .

d Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test—enter:

(1) Value of all assets . . . . .

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed . . . . .

c "Support" alternative test—enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Table with 5 columns: (a) 2024, (b) 2023, (c) 2022, (d) 2021, (e) Total. Rows correspond to lines 2a-e and 3a-d.

Part Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

LAURENE POWELL JOBS

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NA

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

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

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

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

c Any submission deadlines:

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

3 Grants and Contributions Paid During the Year or Approved for Future Payment		Page 11		
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
Recipient Name and address (home or business)				
Name during the year				
MERIDIAN INSTITUTE PO Box 1829 Clinton, CT 06035		PC	Global Alliance for the Future of Food	5,000
ROCKEFELLER PHILANTHROPY ADVISORS INC 120 Broadway Suite 3475 New York, NY 10013		PC	Platform for Agriculture and Climate Transformation (PACT)	1,000,000
NATIONAL WILDLIFE FEDERATION 11100 Wildlife Federation Washington, DC 20005		PC	Great Lakes Regional Center support	250,000
REGENTS OF UNIVERSITY OF CALIFORNIA 10889 Wilshire Blvd Suite 700-53 Los Angeles, CA 90024		PC	Climate Hubs Learning Partnership	1,000,000
ROCKEFELLER PHILANTHROPY ADVISORS INC 90 Church Street Fl 1 7082 New York, NY 10008		PC	General Operating Support	50,000
24 Third Beach Clifton Cape Town, Western Cape 8005 South Africa		PC	Energy transition	550,000
BUSINESS AND HUMAN RIGHTS RESOURCE CENTRE 2-8 SCRUTTON STREET 2ND FLOOR LONDON, EC2A 4RT UK		PC	Civic Engagement	1,170,486
PEOPLE POWERED GLOBAL HUB 157 13th St Brooklyn, NY 11215		PC	General Operating Support	250,000
FOOD SYSTEM 6 ACCELERATOR INC 541 Jefferson Avenue Suite 100 Redwood City, CA 94063		PC	The Chisholm Legacy Project	1,000,000
THE CHISHOLM LEGACY PROJECT INC 15210 Dino Drive PO Box 1031 Northridge, CA 91324		PC	General Operating Support	2,500,000
THE SUNRISE PROJECT AUSTRALIA LTD Ground Floor 37 Randle Street Surry Hills, NSW 1541 Australia		PC	General Operating Support	2,500,000
ROCKEFELLER PHILANTHROPY ADVISORS INC 90 Church Street Fl 1 7082 New York, NY 10008		PC	Climate project support	2,500,000
CORPORACION FISCALIA DEL MEDIO AMBIENTE (FIMA) Mosquito 491 of 312 Santiago, Region Metropolitana 8320112 Chile		PC	General Operating Support	725,000
LEAGUE OF CONSERVATION VOTERS EDUCATION FUND 740 15th Street NW Suite 700 Washington, DC 20005		PC	Civic engagement	1,500,000
CAPE FAREWELL (OCEAN) 1000 The Esplanade Dorchester, DT2 9NS United Kingdom		NC	Our Life is Here charitable project	425,997
NEW YORK CITY ENVIRONMENTAL JUSTICE ALLIANCE 462 36th Street Suite 3F Brooklyn, NY 11218		PC	Climate Hubs Learning Partnership	1,000,000
TIDES FOUNDATION 1012 Torney Avenue San Francisco, CA 94129		PC	Climate Hubs Learning Partnership	1,000,000
THE GRADUATE CENTER FOUNDATION INC 365 Fifth Avenue Room 8204 New York, NY 10018		PC	Platform for Agriculture and Climate Transformation (PACT)	4,000,000
ROCKEFELLER PHILANTHROPY ADVISORS INC 120 Broadway Suite 3475 New York, NY 10013		PC	General Operating Support	1,000,000
CLIMATE POWER EDUCATION FUND 611 Pennsylvania SE Ste 143 Birmingham, AL 35203		PC	Platform for Agriculture and Climate Transformation (PACT)	5,000,000
ROCKEFELLER PHILANTHROPY ADVISORS INC 120 Broadway Suite 3475 New York, NY 10013		PC	General Operating Support	1,000,000
CLIMATE MUSEUM 630 9th Avenue Suite 1010 New York, NY 10018		PC	Climate Corps expansion	5,000,000
CALIFORNIA VOLUNTEERS FUND 1400 Tenth Street Sacramento, CA 95814		PC	Sharing community climate solutions	500,000
FUTURE GENERATIONS UNIVERSITY 400 Road Less Traveled Rd Franklin, WV 26037		PC	Regional planning support	1,000,000
CENTRAL VALLEY COMMUNITY FOUNDATION 1260 Fulton Street Suite 200 Fresno, CA 93721		PC	Connecting people to nature	3,500,000
GIRL SCOUTS OF THE USA 420 5th Avenue New York, NY 10018		PC	General Operating Support	950,000
INTERNATIONAL LAND AND FOREST TENURE FACILITY Franzengatan 1B 6th floor 112 51 Stockholm, S-171 22 Sweden		PC	CALIFORNIA AMBITIONS PROGRAM	10,000,000
TIDES FOUNDATION 1012 TORNEY AVENUE SAN FRANCISCO, CA 94129		PC	General Operating Support	2,000,000
INTERTRIBAL AGRICULTURE COUNCIL INC 100 North 27th Street Suite 500 Billings, MT 59101		PC	Communications support	7,000,000
POTENTIAL ENERGY COALITION INC 477 Madison Avenue Suite 600 New York, NY 10022		PC	Healthy Communities, Healthy Communities	4,500,000
BUILDING DECARBONIZATION COLLECTIVE 191 8th Road NW Washington, DC 20004		PC	General Operating Support	250,000
LIBERTY HILL FOUNDATION 1001 Wilshire Blvd PMB 2170 Los Angeles, CA 90017		PC	General Operating Support	600,000
OPEN BRIEFING LTD The Workbox Wharf Road Penzance, Cornwall TR18 4FG UK		PC	FARM TO SCHOOL PROGRAMS	1,000,000
CHEF ANN FOUNDATION 5485 Conestoga Court Suite 110F Boulder, CO 80301		PC	General Operating Support	1,000,000
NATURA Y ECOSISTEMAS MEXICANOS AC Plaza San Jacinto 23 Mexico City, Mexico 06000		PC	General Operating Support	1,000,000
COLLEGE OF MEMPHIS ENVIRONMENTAL JUSTICE 1752 State Hwy 47/55 PO Box 1179 Keshena, WI 54135		PC	Climate Hubs Learning Partnership	1,000,000
VERENIGING MILIEUDEFENSIE Nieuwe Looiersstraat 31 Amsterdam 1017 VA NL		PC	General Operating Support	5,000,000
RES PUBLICA US INC 50 Riverside Blvd 6J New York, NY 10019		PC	Event sponsorship	300,000
RE-EARTH INITIATIVE INC 4-7404RN Avenue Suite 168 Lang Island, NY 11109		PC	General Operating Support	1,000,000
THE GREAT GATHERING OF HUMANITY INC 6543 E Via Cavalier Tucson, AZ 85714		PC	General Operating Support	18,000,000
CLIMATE IMPERATIVE FOUNDATION 98 Battery Street Suite 201 San Francisco, CA 94111		PC	General Operating Support	50,000
THE TIBET FUND 241 East 32nd Street New York, NY 10016		PC	General Operating Support	750,000
CENTRE FOR ENVIRONMENTAL RIGHTS 1st floor Birkdale 2 River Park Cape Town, Western Cape 7700 South Africa		PC	General Operating Support	750,000
FIRST NATIONS DEVELOPMENT INSTITUTE 2432 Main Street Langmont, C 05011		PC	Regenerative agriculture and conservation	2,500,000
EQUATORIAL CAMPAIGN AND GLOBAL CLIMATE LEGAL DEFENSE 5000 Horton Landing Suite 200 Novato, CA 94949		SO II	General Operating Support	5,000,000
THE HOPS FOUNDATION LOMASUNINGWUKUSIUMANI Khomasi, SW 86039		PC	General Operating Support	160,000
EARTH ISLAND INSTITUTE INC 2150 Alston Way Suite 320 Berkeley, CA 94704		PC	Fossil Fuel Non-Proiferation Treaty Initiative	5,000,000
GROUNDWELL CHARITABLE FOUNDATION 880 Adolfo St Suite 246 El Segundo, CA 90245		PC	General Operating Support	375,000
NIA TERO FOUNDATION 900 E Pine Street Suite 200A Seattle, WA 98122		PC	General Operating Support	1,000,000
GLOBAL FAIRNESS INITIATIVE 1666 Connecticut Avenue NW Suite 2 Washington, DC 20004		PC	SEWA support	1,000,000
FRIENDS OF THE EARTH 1101 15th St NW 11th Floor Washington, DC 20005		PC	FARM TO School programs	1,000,000
KITCHEN TABLE ADVISORS 2150 Alston Way Suite 320 Berkeley, CA 94704		PC	General Operating Support	600,000
EMERALD CITIES COLLABORATIVE INC 1660 L Street NW Suite 204 Washington, DC 20036		PC	Culture & climate	250,000
HOP1 TUTSKWA PERMACULTURE INSTITUTE INC PO Box 967 New York, NY 10013		PC	General Operating Support	50,000
JUST ASSOCIATES INC 1900 L St NW Suite 504 Washington, DC 20036		PC	General Operating Support	1,000,000
Q FOUNDATION 208-10 Cross Island Parkway 107 Bayside, NY 11360		PC	COF30 public awareness	200,000
FUNDACION AMBIENTE Y RECURSOS NATURALES Sanchez de Bustamante 27 Ciudad Buenos Aires 1173 AR		PC	General Operating Support	50,000
THE EARTH SPECIES PROJECT 1536 Oxford Street Berkeley, CA 94709		PC	General Operating Support	3,000,000
FOUNDATION EARTH 510 G Street NE Washington, DC 20002		PC	General Operating Support	50,000
PANORAMA GLOBAL 2101 4th Avenue Suite 2100 Seattle, WA 98121		PC	Community health support	1,000,000
SPIRIT ROCK MEDITATION CENTER PO Box 169 Woodacre, CA 94973		PC	Connecting people to nature	1,000,000
EARTHWORKS 1612 K Street NW Suite 904 Washington, DC 20006		PC	General Operating Support	425,000
WINDWARD FUND 1828 L Street NW Suite 300-C Washington, DC 20036		PC	HIVE FUND	5,000,000
FUSE CORPS One Embarcadero Center Unit 2670 San Francisco, CA 94112		PC	Fellowship program	2,500,000
GLOBAL ALLIANCE FOR RENEWABLE ALTERNATIVES 195B University Avenue Berkeley, CA 94704		PC	General Operating Support	200,000
SUSTAINABLE MARKETS FOUNDATION 40 West 37th Street Suite 1000 New York, NY 100187311		PC	Global Gas and Oil Network	50,000
THE KITCHEN TABLE 2150 Alston Way Suite 320 Berkeley, CA 94704		PC	General Operating Support	600,000
EMERALD CITIES COLLABORATIVE INC 1660 L Street NW Suite 204 Washington, DC 20036		PC	Culture & climate	250,000
HOP1 TUTSKWA PERMACULTURE INSTITUTE INC PO Box 967 New York, NY 10013		PC	General Operating Support	50,000
JUST ASSOCIATES INC 1900 L St NW Suite 504 Washington, DC 20036		PC	General Operating Support	1,000,000
Q FOUNDATION 208-10 Cross Island Parkway 107 Bayside, NY 11360		PC	COF30 public awareness	200,000
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SUSTAINABLE MARKETS FOUNDATION 40 West 37th Street Suite 1000 New York, NY 100187311		PC	Global Gas and Oil Network	50,000
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FOUNDATION EARTH 510 G Street NE Washington, DC 20002		PC	General Operating Support	50,000
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SUSTAINABLE MARKETS FOUNDATION 40 West 37th Street Suite 1000 New York, NY 100187311		PC	Global Gas and Oil Network	50,000
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SUSTAINABLE MARKETS FOUNDATION 40 West 37th Street Suite 1000 New York, NY 100187311		PC	Global Gas and Oil Network	50,000
THE KITCHEN TABLE 2150 Alston Way Suite 320 Berkeley, CA 94704		PC	General Operating Support	600,000
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THE EARTH SPECIES PROJECT 1536 Oxford Street Berkeley, CA 94709		PC	General Operating Support	3,000,000
FOUNDATION EARTH 510 G Street NE Washington, DC 20002		PC	General Operating Support	50,000
PANORAMA GLOBAL 2101 4th Avenue Suite 2100 Seattle, WA 98121		PC	Community health support	1,000,000
SPIRIT ROCK MEDITATION CENTER PO Box 169 Woodacre, CA 94973		PC	Connecting people to nature	1,000,000
EARTHWORKS 1612 K Street NW Suite 904 Washington, DC 20006		PC		

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

- 1 Program service revenue:
a
b
c
d
e
f
g Fees and contracts from government agencies
2 Membership dues and assessments
3 Interest on savings and temporary cash investments
4 Dividends and interest from securities
5 Net rental income or (loss) from real estate:
a Debt-financed property.
b Not debt-financed property.
6 Net rental income or (loss) from personal property
7 Other investment income
8 Gain or (loss) from sales of assets other than inventory
9 Net income or (loss) from special events:
10 Gross profit or (loss) from sales of inventory
11 Other revenue:
a ORDINARY LOSS
b
c
d
e

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Includes rows for various income categories and a total row at the bottom.

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Table with 2 columns: Line No., Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes.



## **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:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	545,668	181,424		364,244

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

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

**Name:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
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**Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.**

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**Name:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
CAPE FAREWELL	The Watershed Sydling St Nicholas Dorchester, Dorset DT2 9NS UK	2024-03-15	425,997	Our Life is Here Charitable Project	425,997	NO	03/31/2024	2024-09-16	TO THE KNOWLEDGE OF THE WAVERLEY STREET FOUNDATION, NO PART OF THE GRANT HAS BEEN USED FOR OTHER THAN ITS INTENDED PURPOSE. THE GRANTEE PROVIDED THE ANNUAL ER REPORT FOR FISCAL YEAR-END 03/31/2024 STATING 425,997 IN GRANT FUNDS WAS EXPENDED TO EXECUTE THE OUR LIFE IS HERE PROJECT.
GROWALD CLIMATE FUND	1 HARVARD ST SUITE 202 BROOKLINE, MA 02445	2024-10-24	150,000	EVENT SPONSORSHIP	150,000	NO	03/27/2025	2025-03-27	FUNDS WERE USED TO COVER CONSULTANTS AND EVENT EXPENSES INCLUDING CSO ROOMS AND MEALS. THE GRANTEE PROVIDED THE ANNUAL ER REPORT STATING 150,000 IN GRANT FUNDS WAS EXPENDED TO EXECUTE THE PROJECT.
WPIF II MANAGER LLC	2400 MARKET ST 200 PHILADELPHIA, PA 19103	2024-08-30	5,000,000	Community clean energy fund investment	31,125	NO	10/28/2025	2025-10-28	FUNDS WERE USED TO COVER GENERAL BUSINESS AND LEGAL EXPENSES IN CONNECTION WITH NEGOTIATING, DOCUMENTING, AND CLOSING INVESTMENT INTO WPIF II MANAGER LLC. THE GRANTEE PROVIDED THE ANNUAL ER REPORT STATING 31,125 IN FUNDS WAS EXPENDED FOR THE INVESTMENT.

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**Name:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Name of Bond	End of Year Book Value	End of Year Fair Market Value
GS BANK USA TERM DEPOSIT	200,000,000	200,742,082

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**Name:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Name of Stock	End of Year Book Value	End of Year Fair Market Value
APPLE INC.	269,052,000	601,008,000
TEMPERPACK TECHNOLOGIES INC	12,005,572	14,526,742

**TY 2024 IRS 990 e-File Render****Name:** WAVERLEY STREET FOUNDATION**EIN:** 81-3242506

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
OHA DELAWARE CUSTOMIZED CREDIT	AT COST	744,239,224	741,039,177
TURNER MULTIFAMILY IMPACT FUND	AT COST	34,333,638	47,039,092
OREI CREDIT II A LP	AT COST	6,961,116	6,815,506
PURPOSE ALTERNATIVE FUND-F LLC	AT COST	582,794,165	787,540,100
TURNER-AGASSI EDU FUND III LP	AT COST	3,343,669	2,876,958
MEADOWLARK LANDS I LP	AT COST	22,861,018	26,645,091
CIM ENTERPRISE LOAN FUND LP	AT COST	95,950,608	97,992,053
HORIZON ENVIRONMENT & CLIMATE	AT COST	30,050,155	41,680,529
EMBER INFRASTRUCTURE FUND I-A	AT COST	39,544,983	47,872,042
CVI CLEAN ENERGY FUND C II LP	AT COST	31,737,400	32,083,596
ECOFIN CLIMATE CHAMPIONS FUND	AT COST	91,099,625	94,536,915
BAIN CAPITAL PE ENDURING FUND	AT COST	447,506,895	469,022,138

# TY 2024 IRS 990 e-File Render

**Name:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	468,585			468,585

# TY 2024 IRS 990 e-File Render

**Name:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
CAPITALIZED FEES - INVESTMENTS	961,710	1,002,797	1,002,797
WPIF II MANAGER LLC (PRI)	0	4,999,891	5,011,097

**TY 2024 IRS 990 e-File Render****Name:** WAVERLEY STREET FOUNDATION**EIN:** 81-3242506

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PORTFOLIO DEDUCTIONS FROM K-1S	19,331,504	18,962,311		
RRF-1 FEES	1,000			1,000
INSURANCE	73,810	24,603		49,207
OTHER DEDUCTIONS FROM K-1S	218,990	218,990		
MEMBERSHIP FEES	6,850			6,850
OFFICE EXPENSES	270,318			270,318
DUES & SUBSCRIPTIONS	124,554			124,554
PAYROLL PROCESSING FEES	30,080	3,008		27,072
FEES & LICENSES	30,599			30,599
NONDEDUCTIBLE EXP FROM K-1S	41,881			
BANK FEES	1,904			1,904
MISCELLANEOUS EXPENSES	16,727			16,727
MEALS & ENTERTAINMENT	38,060			38,060
TRANSPORTATION	6,504			6,504
PARKING/MILEAGE	4,712			4,712
EVENTS	174,558			174,558

# TY 2024 IRS 990 e-File Render

**Name:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
SECTION 988 GAIN (LOSS) FROM K-1S	1,572,668	1,574,867	
SUBPART F INCOME FROM K-1S	19,777,204	19,777,204	
PFIC INCOME FROM K-1S	1,442,159	1,442,159	
OTHER INCOME FROM K-1S	-14,442,501	-14,442,501	
ORDINARY INCOME (LOSS) FROM K-1S	-399,673	0	
Non-Taxable Receipts	1,859	0	

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTING FEES	11,703,301			11,703,301
AUDIT FEES	96,500			96,500
RECRUITMENT FEES	1,036,242			1,036,242
INVESTMENT EXPENSES	121,541	121,541		

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**Name:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX FROM K-1S	297,586	297,586		
FEDERAL EXCISE TAXES	5,000,000			
LLC TAX	800			800
PAYROLL TAXES	326,438	32,644		293,794

# TY 2024 IRS 990 e-File Render

**Name:** WAVERLEY STREET FOUNDATION

**EIN:** 81-3242506

Name	US / Foreign Address	EIN	Description	Amount
OREI CREDIT II A LP	401 CONGRESS AVENUE SUITE 2750 AUSTIN, TX 78701	84-2659221	CAPITAL DISTRIBUTION, NO EXCESS BUSINESS HOLDING	26,367,518
OHA DELAWARE CUSTOMIZED CREDIT FUND-F LP	201 MAIN STREET SUITE 1250 FORT WORTH, TN 76102	83-1421034	CAPITAL DISTRIBUTION, NO EXCESS BUSINESS HOLDING	51,236,503
<b>Total</b>				77,604,021

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**EIN:** 81-3242506

Name	US / Foreign Address	EIN	Description	Amount
PURPOSE ALTERNATIVE CREDIT FUND - F LLC	1603 ORRINGTON AVENUE 13TH FLOOR EVANSTON, IL 60201	85-0674038	CAPITAL CONTRIBUTION, NO EXCESS BUSINESS HOLDING	5,500,000
OREI CREDIT II A LP	401 CONGRESS AVENUE SUITE 2750 AUSTIN, TX 78701	84-2659221	CAPITAL CONTRIBUTION, NO EXCESS BUSINESS HOLDING	7,379,263
ECOFIN CLIMATE CHAMPIONS FUND LLC	1209 ORANGE STREET WILMINGTON, DE 19801	88-1080806	NO EXCESS BUSINESS HOLDING	0
BAIN CAPITAL PUBLIC EQUITY ENDURING	200 CLARENDON STREET FL 41 BOSTON, MA 02116	92-0683250	NO EXCESS BUSINESS HOLDING	0
<b>Total</b>				12,879,263