

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: The Swaha Foundation. A Employer identification number: 83-3505984. B Telephone number: (303) 596-4283. 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. I Fair market value of all assets at end of year: \$17,778,886. J Accounting method: Cash.

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 4 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 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 and depletion; 20 Occupancy; 21 Travel, conferences, and meetings; 22 Printing and publications; 23 Other expenses; 24 Total operating and administrative expenses; 25 Contributions, gifts, grants paid; 26 Total expenses and disbursements; 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
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	223,974	368,638	368,638
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)	618,174	638,538	638,538
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)	736,493	778,442	778,462
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	16,289,803	15,864,050	15,864,050
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	100,000	129,198	129,198	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	17,968,444	17,778,866	17,778,886	
Liabilities	17 Accounts payable and accrued expenses	7,065	17	
	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).	7,065	17	
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	17,961,379	17,778,849	
	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)	17,961,379	17,778,849		
30 Total liabilities and net assets/fund balances (see instructions)	17,968,444	17,778,866		

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	17,961,379
2 Enter amount from Part I, line 27a	2	158,539
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	18,119,918
5 Decreases not included in line 2 (itemize) ▶ _____	5	341,069
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	17,778,849

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows include Sales of Publicly Traded Securities and Realized Gain/Loss from Partnerships.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Rows include a through e.

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)). Rows include a through e.

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

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

Table for excise tax calculation with rows 1a through 11. Includes sections for exempt operating foundations, tax under section 511, tax based on investment income, and credits/payments.

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)
▶ CO
- 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 ▶ N/A

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

14 The books are in care of ▶ Julie Goldstein Telephone no. ▶ (303) 596-4283
 Located at ▶ PO Box 2214 Boulder CO ZIP+4 ▶ 803062214

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 ▶

	Yes	No
16		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
1a(1)		No
1a(2)		No
1a(3)		No
1a(4)		No
1a(5)		No
1a(6)		No
1b		No
1d		No
2a		No
2b		
3a		No
3b		
4a		No
4b		No

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

- 5a** During the year did the foundation pay or incur any amount to:
 - (1)** Carry on propagand, or otherwise attempt to influence legislation (section 4945(e))?
 - (2)** Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
 - (3)** Provide a grant to an individual for travel, study, or other similar purposes?
 - (4)** Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions
 - (5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?
- 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
- c** Organizations relying on a current notice regarding disaster assistance check
- d** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?
If "Yes," attach the statement required by Regulations section 53.4945-5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
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?
- b** If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
- 8** Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

	Yes	No
5a(1)	No	No
5a(2)	No	No
5a(3)	No	No
5a(4)	No	No
5a(5)	No	No
5b	No	No
5d	No	No
6a	No	No
6b	No	No
7a	No	No
7b	No	No
8	No	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
Julie Goldstein PO Box 2214 Boulder, CO 803062214	President 40.00	80,738		

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.

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
NONE		

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 Citizen Potawatomi CDC	115,000
2	
3 All other program-related investments. See instructions.	

Total. Add lines 1 through 3 ▶ 115,000

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	13,240,998
b	Average of monthly cash balances.	1b	180,523
c	Fair market value of all other assets (see instructions).	1c	4,524,685
d	Total (add lines 1a, b, and c).	1d	17,946,206
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d.	3	17,946,206
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	269,193
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	17,677,013
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	883,851

Part X Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part IX, line 6.	1	883,851
2a	Tax on investment income for 2024 from Part V, line 5.	2a	9,071
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	9,071
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	874,780
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	874,780
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	874,780

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	592,296
b	Program-related investments—total from Part VIII-B	1b	115,000
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	707,296

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7				874,780
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.			690,402	
b Total for prior years: 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2024:				
a From 2019.				
b From 2020.				
c From 2021.				
d From 2022.				
e From 2023.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ <u>707,296</u>				
a Applied to 2023, but not more than line 2a			690,402	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2024 distributable amount				16,894
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2024. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				857,886
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a				
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				

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

Table with 5 columns: (a) 2024, (b) 2023, (c) 2022, (d) 2021, (e) Total. Rows include 2a, 2b, 2c, 2d, 2e, 3a, 3b, 3c, 3d, 3e, 3f, 3g, 3h, 3i, 3j, 3k, 3l, 3m, 3n, 3o, 3p, 3q, 3r, 3s, 3t, 3u, 3v, 3w, 3x, 3y, 3z.

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

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

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

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

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

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

c Any submission deadlines:

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

Part Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> Pathfinders 6550 Camp Bowie Blvd Suite 111 Fort Worth, TX 76116	N/A	P C	General Support	500
Girl Rising 28 Verandah Place Brooklyn, NY 11201	N/A	P C	General Support	51,000
Conservation Colorado Education Fun 1536 Wynkoop Street Suite 510 Denver, CO 80202	N/A	P C	General Support	30,000
Neshama Center PO Box 8064 Aspen, CO 81612	N/A	P C	General Support	180
Moving Traditions 8380 Old York Road Suite 4300 Elkins Park, PA 19027	N/A	P C	General Support	5,000
Independence Pass Fund PO Box 1700 Aspen, CO 81612	N/A	P C	General Support	500
English in Action PO Box 4856 Basalt, CO 81621	N/A	P C	General Support	5,000
Sounds True Foundation 413 S Arthur Ave Louisville, CO 80027	N/A	P C	General Support	500
Protect Our Winters 4676 Broadway Street Boulder, CO 80304	N/A	P C	General Support	500
Watershed School 1661 Alpine Avenue Boulder, CO 80304	N/A	P C	General Support	110,436
Cambodian Children's 2309 Santa Monica Blvd PMB 833 Santa Monica, CA 90404	N/A	P C	General Support	1,200
Free Flow Foundation PO Box 50153 Jacksonville Beach, FL 32240	N/A	P C	General Support	5,000
Girl Ventures 119 Filbert Street Oakland, CA 94607	N/A	P C	General Support	50,000
Style Her Empowered 304 S 1200 E Salt Lake City, UT 84102	N/A	P C	General Support	50,000
Thorne Nature Experience 1466 63rd St Boulder, CO 80303	N/A	P C	General Support	25,000
Friendship Bridge 1105 Spruce St	N/A	P C	General Support	25,000

Boulder, C O 80302 Aspen Community Foundation	N/A	P C	General Support	2,500
455 Gold Rivers Ct Ste 515 Basalt, C O 81621	N/A	P C	General Support	5,000
1575 Franklin Street Denver, C O 80218	N/A	P C	General Support	50,000
Amplify Girls Inc	N/A	P C	General Support	10,000
228 Park Ave S Suite 34731 New York, NY 10003	N/A	P C	General Support	1,000
ByKids	N/A	P C	General Support	2,500
330 West End Avenue 7A New York, NY 10023	N/A	P C	General Support	1,000
Boulder JCC	N/A	P C	General Support	1,000
6007 Oreg Ave Boulder, C O 80303	N/A	P C	General Support	2,500
Rios to Rivers	N/A	P C	General Support	1,000
1280 Ute Avenue Ste 4 Aspen, C O 81611	N/A	P C	General Support	35,000
Outdooraafro	N/A	P C	General Support	
1999 Harrison St 18th Floor PMB 244 Oakland, C A 94612	N/A	P C	General Support	
Shanti Bhavan	N/A	P C	General Support	
12819 SE 38th St 48 Bellevue, WA 98006				
Total			3a	466,816
b <i>Approved for future payment</i>				
Total			3b	

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

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

13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)

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: 24020490

Software Version: 2024v5.2

Form 990PF - Special Condition Description:

Special Condition Description

TY 2024 IRS 990 e-File Render**Name:** The Swaha Foundation**EIN:** 83-3505984**Software ID:** 24020490**Software Version:** 2024v5.2

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Bank Of America C Var 28 Due 11/10/28	52,446	52,466
Equinix Inc 1.55% 3/15/28	45,255	45,255
Pfizer Inc 2.625% 4/1/30	36,059	36,059
African Dev BK4.125% 27F Due 02/25/27	45,413	45,413
Univ CA 3.159% 5/15/25	19,986	19,986
NextEra Energy CA 1.9% 6/15/28	45,273	45,273
JP Morgan Chase VAR 25 8/9/25	51,647	51,647
Interntnl Bk 4.5% 4/10/31	25,199	25,199
Interntnl FIN 2.125% 26F 4/7/26	48,808	48,808
Wells Fargo & Co Var 26 8/15/26	60,148	60,148
Air Products And 4.85% ³⁴ Due 02/08/34	39,835	39,835
Intel Corp 4.15% 32 8/5/32	36,966	36,966
Comcast Corp 4.65% 33 2/15/33	58,946	58,946
Inter Amern Dev 3.5% 33F 4/12/33	37,245	37,245
American Express 4.05 % Due 3/3/29	39,228	39,228
Asian Infrastr4.125% 29F Due 01/18/29	55,394	55,394
Kreditanstalt Fur Wiederaufbau1% 10/1/26	4,734	4,734
Prologis LP 1.25 % 10/15/30	41,036	41,036
The Goldman Sachs Var 06/15/27	34,824	34,824

TY 2024 IRS 990 e-File Render

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EIN: 83-3505984

Software ID: 24020490

Software Version: 2024v5.2

**US Government Securities - End of
Year Book Value:**

87,007

**US Government Securities - End of
Year Fair Market Value:**

87,007

**State & Local Government
Securities - End of Year Book
Value:**

551,531

**State & Local Government
Securities - End of Year Fair
Market Value:**

551,531

TY 2024 IRS 990 e-File Render

Name: The Swaha Foundation

EIN: 83-3505984

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Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Align Impact Fund II, LP	AT COST	380,899	380,899
Align TMIF II Access Fund LP	AT COST	470,777	470,777
Greenbacker Renewable Energy Class PI	AT COST	108,287	108,287
Rose Affordable Housing V LP	AT COST	370,526	370,526
SJF Ventures Fund V LP	AT COST	116,967	116,967
Sonen Global Sustainable LLC	AT COST	123,009	123,009
UP Fund LP	AT COST	32,039	32,039
Calvert Impact CA 1.5% 3/15/24	AT COST	249,234	249,234
Achieve Partners Workforce Fund	AT COST	827,541	827,541
CIM Enterprise Loan Fund LP	AT COST	667,283	667,283
Colorado Enterprise Fund	AT COST	250,000	250,000
Founders First Capital Partners	AT COST	99,997	99,997
HCAP Partners V	AT COST	184,531	184,531
Rethink Education III	AT COST	250,925	250,925
Windsail Credit QP Fund	AT COST	128,935	128,935
Zeal Capital Partners Fund I	AT COST	216,245	216,245
Greenbacker Renewable Energy Class SF	AT COST	565,963	565,963
City Light Impact Ventures IV	AT COST	226,598	226,598
Vital Farmland REIT	AT COST	49,216	49,216
Calvert Impact CA 5.0% 3/15/29	AT COST	244,801	244,801
iShares Esg Aware MSCI EAFE, 2,592 Sh	FMV	197,355	197,355
iShares Esg Aware MSCI USA, 8960.2101 Sh	FMV	1,154,254	1,154,254
Nuveen ESG Emerging Mkt, 18,890 Sh	FMV	548,188	548,188
Nuveen ESG Mid Cap, 3,673 Sh	FMV	127,857	127,857
Nuveen ESG Small Cap, 19,521 Sh	FMV	817,579	817,579
Calvert Equity I, 8,597.06 Sh	FMV	797,377	797,377
Calvert International, 32,301.682 Sh	FMV	949,669	949,669
Calvert Mid Cap, 9,650.105 Sh	FMV	441,685	441,685
Calvert Small Cap, 22,551.9890 Sh	FMV	833,070	833,070
Calvert US Large Cap Core, 26,456.482 Sh	FMV	1,334,201	1,334,201
DFA Em Mkts, 27,777.218 Sh	FMV	261,661	261,661
DFA Intl Sustainability, 74,475.999 Sh	FMV	929,460	929,460
Versus Cap Multi-Man, 4,563.98 Sh	FMV	111,954	111,954
Iroquois Valley Farmland, 1,335.087 Sh	FMV	156,205	156,205
Invesco MSCI Sustainable, 10,885.3567 Sh	FMV	440,170	440,170
JPMorgan Ultra Short Income ETF	FMV	599,856	599,856
iShares ESG Aware MSCI EM ETF, 2,549 Sh	FMV	85,111	85,111
Impax Global Environment, PGINX	FMV	514,625	514,625

TY 2024 IRS 990 e-File Render

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal Fees	495	0	0	495

TY 2024 IRS 990 e-File Render

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Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank Fees	1,237	1,237		
Dues & Membership	140			140
Filing Fees	75			75
Miscellaneous Expenses	465			465
Payroll Fees	1,459			1,459
Postage, Mailing Service	184			184
Subscriptions	264			264
Website	150			150

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Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Partnership Income	41,448	42,237	
Return of Capital	99,687		

TY 2024 IRS 990 e-File Render

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Advisor Fees	61,731	61,731	0	0

TY 2024 IRS 990 e-File Render

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Software Version: 2024v5.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise Tax	672			