

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 Mental Insight Foundation. A Employer identification number: 94-3256579. B Telephone number: (925) 299-1040. C If exemption application is pending, check here. D 1. Foreign organizations, check here. D 2. Foreign organizations meeting the 85% test, check here and attach computation. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. H Check type of organization: Section 501(c)(3) exempt private foundation. J Accounting method: Cash. Fair market value of all assets at end of year: \$106,375.

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

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), leading to Total expenses and disbursements (26) and Excess of revenue over expenses and disbursements (27).

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	544,766	2,753	2,753
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	5,048,550	81,861	81,861
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	686,727		
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	79,480	21,761	21,761	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	6,359,523	106,375	106,375	
Liabilities	17 Accounts payable and accrued expenses	18,998	44	
	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 ▶ _____)	130,100		
	23 Total liabilities (add lines 17 through 22)	149,098	44	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	6,250,000	6,250,000	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds	-39,575	-6,143,669	
29 Total net assets or fund balances (see instructions)	6,210,425	106,331		
30 Total liabilities and net assets/fund balances (see instructions)	6,359,523	106,375		

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	6,210,425
2 Enter amount from Part I, line 27a	2	-5,430,328
3 Other increases not included in line 2 (itemize) ▶ _____	3	14,929
4 Add lines 1, 2, and 3	4	795,026
5 Decreases not included in line 2 (itemize) ▶ _____	5	688,695
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	106,331

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a UBS x10127 - ST NC	P	2024-01-01	2024-12-31
b UBS x10127 - LT NC	P	2020-01-01	2024-12-31
c Private Equity Core Fund III Per K-1	P	2024-01-01	2024-12-31
d Private Equity Core Fund III Per K-1	P	2020-01-01	2024-12-31
e Private Equity Core Fund V Per K-1	P	2024-01-01	2024-12-31
Private Equity Core Fund V Per K-1	P	2020-01-01	2024-12-31

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 6,267,094		6,258,684	8,410
b 1,617,323		1,617,106	217
c 47			47
d		16,536	-16,536
e		227	-227
50,601			50,601

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (i) over col. (j), if any	
a			8,410
b			217
c			47
d			-16,536
e			-227
			50,601

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	42,512
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		3	8,230

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	3,623
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	
3 Add lines 1 and 2.		3	3,623
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.		5	3,623
6 Credits/Payments:			
a 2024 estimated tax payments and 2023 overpayment credited to 2024	6a 10,967		
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7 10,967		
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached.	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	10 7,344		
11 Enter the amount of line 10 to be: Credited to 2025 estimated tax Refunded	11 7,344		

Part VI-A Statements Regarding Activities

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

Table with columns Yes, No and row 1a

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

Table with columns Yes, No and row 1b

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

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

Table with columns Yes, No and row 1c

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

Table with columns Yes, No and row 1d

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?

Table with columns Yes, No and row 2

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?

Table with columns Yes, No and row 3

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

Table with columns Yes, No and row 4a

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

Table with columns Yes, No and row 4b

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

Table with columns Yes, No and row 5

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?

Table with columns Yes, No and row 6

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

Table with columns Yes, No and row 7

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

CA

Table with columns Yes, No and row 8a

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?

Table with columns Yes, No and row 8b

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

Table with columns Yes, No and row 9

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

Table with columns Yes, No and row 10

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

Table with columns Yes, No and row 11

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

Table with columns Yes, No and row 12

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

N/A

Table with columns Yes, No and row 13

14 The books are in care of Mark Trammell Telephone no. (925) 299-1040 Located at 1777 Botelho Dr Ste 350 Walnut Creek CA 94596 ZIP+4

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

Table with columns Yes, No and row 15

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

Table with columns Yes, No and row 16

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

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


- 1a** During the year did the foundation (either directly or indirectly):
 - (1)** Engage in the sale or exchange, or leasing of property with a disqualified person?
 - (2)** Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
 - (3)** Furnish goods, services, or facilities to (or accept them from) a disqualified person?
 - (4)** Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
 - (5)** Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?
 - (6)** Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)
- b** If any answer is "Yes" to 1a(1)–(6); did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions
- c** Organizations relying on a current notice regarding disaster assistance check here.
- d** Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2024?
- 2** Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
 - a** At the end of tax year 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024?
If "Yes," list the years ► 20___, 20___, 20___, 20___
 - b** Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)
 - c** If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ► 20___, 20___, 20___, 20___
- 3a** Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
- b** If "Yes," did it have excess business holdings in 2024 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2024.)
- 4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
- b** Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2024?

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

Part 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
Diamond Philanthropy Advisors 463 2nd St West Suite E Sonoma, C A 95476	Foundation Mgmt.	566,450

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

Part VIII- Summary of Direct Charitable Activities


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

	Expenses
1 None	0
2	
3	
4	

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

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

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

Total. Add lines 1 through 3 

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	4,195,441
b	Average of monthly cash balances.	1b	102,661
c	Fair market value of all other assets (see instructions).	1c	21,761
d	Total (add lines 1a, b, and c).	1d	4,319,863
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	4,319,863
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	64,798
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	4,255,065
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	212,753

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	212,753
2a	Tax on investment income for 2024 from Part V, line 5.	2a	3,623
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	3,623
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	209,130
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	209,130
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	209,130

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	5,825,681
b	Program-related investments—total from Part VIII-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.	4	5,825,681

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				209,130
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.				
b Total for prior years: 20 ____, 20 ____, 20 ____				
3 Excess distributions carryover, if any, to 2024:				
a From 2019.	1,504,808			
b From 2020.	2,387,092			
c From 2021.	2,915,294			
d From 2022.	3,842,829			
e From 2023.	3,343,498			
f Total of lines 3a through e.	13,993,521			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ <u>5,825,681</u>				
a Applied to 2023, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2024 distributable amount				209,130
e Remaining amount distributed out of corpus	5,616,551			
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	19,610,072			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)	1,504,808			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	18,105,264			
10 Analysis of line 9:				
a Excess from 2020	2,387,092			
b Excess from 2021	2,915,294			
c Excess from 2022.	3,842,829			
d Excess from 2023	3,343,498			
e Excess from 2024	5,616,551			

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 2b (85% of line 2a), 2c (Qualifying distributions from Part XI), 2d (Amounts included in line 2c not used directly for active conduct of exempt activities), 2e (Qualifying distributions made directly for active conduct of exempt activities), 3 (Complete 3a, b, or c for the alternative test relied upon: 3a 'Assets' alternative test, 3b 'Endowment' alternative test, 3c 'Support' alternative test).

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 e-mail address of the person to whom applications should be addressed:
Board of Directors
1777 Botelho Dr Ste 350
Walnut Creek, CA 94596
(925) 299-1040

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

c Any submission deadlines:
None

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> Hoffman Institute 223 San Anselmo Ste 4 San Anselmo, CA 94901	None	P C	CHARITABLE	100,000
Amazon Watch 1 Haight St Ste B San Francisco, CA 94102	None	P C	CHARITABLE	90,000
At the Crossroads 333 Valencia St Suite 320 San Francisco, CA 94103	None	P C	charitable	50,000
Earth Island Institute 300 Broadway Suite 28 San Francisco, CA 94133	None	P C	charitable	230,000
Hospitality Homes PO Box 15265 Boston, MA 02215	None	P C	Charitable	60,000
Bridge Fund of New York City Inc 271 Madison Avenue Suite 907 New York, NY 10016	None	P C	Charitable	100,000
Riverkeeper 20 Secor Road Ossining, NY 10562	None	P C	Charitable	150,000
Home for Contemp Theatre Art 145 6th Ave New York, NY 10013	None	P C	Charitable	55,000
Carbon Cycle Institute 245 Kentucky St Ste D Petaluma, CA 94952	None	P C	Charitable	50,000
Clean Ocean Action Inc 18 Hartshorne Dr Suite 2 Highlands, NJ 07732	None	P C	Charitable	50,000
Clubbed Thumb Inc 440 Lafayette St 4th Floor New York, NY 10003	None	P C	Charitable	50,000
Collected Objects Inc 100 Newell St Apt 2R Brooklyn, NY 11222	None	P C	Charitable	5,000
My Stuff Bags Foundation 5347 Sterling Center Dr Westlake Village, CA 91361	None	P C	Charitable	100,000
Peculiar Works Project Inc 595 Broadway 2nd Fl New York, NY 10012	None	P C	Charitable	2,500
Regeneration Project 369 Pine St 700 San Francisco, CA 94104	None	P C	Charitable	50,000
Tank LTD 151 W 46th Street 8th Fl	None	P C	Charitable	50,000

New York, NY 10036				
CA Institute Yiddish-Yung Yiddish	None	P C	charitable	3,000
333 Washington Blvd 118 Marina Del Rey, CA 90292				
Friends of Children Inc	None	P C	charitable	100,000
245 Russell St Ste 22 Hadley, MA 01035				
Immediate Medium Inc	None	P C	charitable	1,000
525 Grand St Brooklyn, NY 11211				
Ketamine Research Foundation	None	P C	charitable	125,000
6 Crest Road San Anselmo, CA 94960				
Fractured Atlas Inc	None	P C	Charitable	19,000
248 West 35th Street 10th Floor New York, NY 10001				
Algalita Marine Research and Educat	None	P C	Charitable	30,000
148 N Marina Dr Long Beach, CA 90803				
Grey Muzzle Organization	None	P C	Charitable	40,000
14460 Falls of Neuse Road Raleigh, NC 27614				
Portland Experimental Theatre Ensem	None	P C	Charitable	15,000
3520 SE Yamhill St Portland, OR 97214				
Protect Our Winters	None	P C	Charitable	50,000
4676 Broadway Street Boulder, CO 80304				
Springboard for the Arts	None	P C	Charitable	2,500
262 University Ave W St Paul, MN 55103				
Art of Yoga Project	None	P C	Charitable	50,000
330 Twin Dolphin Drive Ste 131 Redwood City, CA 94065				
Brick Theater Inc	None	P C	Charitable	85,000
PO Box 1851 Radio City Station New York, NY 10101				
CA Assn of Resource Conservation Di	None	P C	Charitable	30,000
705 E Bidwell Street Suite 2-415 Folsom, CA 95630				
Congress for Jewish Culture Inc	None	P C	Charitable	5,000
306 W 18th St Apt 2b New York, NY 10011				
Dance to Be Free	None	P C	Charitable	20,000
3980 N Broadway Ste 103 PMB - 215 Boulder, CO 80304				
Kiss The Ground	None	P C	Charitable	50,000
2236 S Barrington Ave Los Angeles, CA 90064				
Mason Holdings Theatre Inc	None	P C	Charitable	2,000
241 6th Avenue 5A New York, NY 10014				
Mighty Earth Inc	None	P C	Charitable	60,000

1150 Connecticut Avenue NW Ste 800 Washington, D C 20036				
New York Live Arts Inc 219 West 19th Street New York, NY 10011	None	P C	Charitable	5,000
Ocean Voyages Institute 2400 Bridgeway 210 Sausalito, C A 94965	None	P C	Charitable	100,000
Prison Dharma Network Inc PO Box 206 South Deerfield, M A 01373	None	P C	Charitable	30,000
Survival International USA 6 Charterhouse Buildings London EC1M 7ET UK	None	P C	Charitable	40,000
A Home Within 195 41st St 11172 Oakland, C A 94611	None	P C	Charitable	60,000
Art Start Inc 317 Sutton Pl Santa Rosa, C A 95407	None	P C	Charitable	40,000
Feeding Pets of the Homeless 400 W King St 200 Carson City, N V 89703	None	P C	Charitable	70,000
Good Shepherd Services 7th Ave 9 New York, NY 10001	None	P C	Charitable	30,000
Knights of Indulgence Theatre US 461 Sebastopol Ave Santa Rosa, C A 95401	None	P C	Charitable	25,000
Prison Yoga Project PO Box 415 Bolinas, C A 94924	None	P C	Charitable	30,000
Regents of the Univ of CA San Franc 505 Parnassus Ave San Francisco, C A 94143	None	P C	Charitable	240,000
Safe Place for Youth Inc 340 Sunset Ave Venice, C A 90291	None	P C	Charitable	30,000
5 Gyres Institute 5792 W Jefferson Blvd Los Angeles, C A 90016	None	P C	charitable	90,000
Upstream Policy Institute Inc PO Box 1352 Damariscotta, M E 04543	None	P C	Charitable	70,000
A Host of People 40 NW 3rd St Ste 305 Miami, FL 33128	None	P C	Charitable	50,000
Farmer Veteran Coalition 508 2nd St 206 Davis, C A 95616	None	P C	Charitable	75,000
Marin Humane Society 171 Bel Marin Keys Blvd Novato, C A 94949	None	P C	Charitable	60,000
Massachusetts Coalition for the Hom	None	P C	Charitable	120,000

73 Buffum St Lynn, MA 01902				
Signal-Return Inc	None	P C	Charitable	15,000
1345 Division St 102 Detroit, MI 48207				
Spirit Rock Meditation Center	None	P C	Charitable	150,000
5000 Sir Francis Drake Blvd Woodacre, CA 94973				
Theater et al Inc	None	P C	Charitable	65,000
5-39 49th Ave Long Island, NY 11101				
Animal Legal Defense Fund	None	P C	Charitable	50,000
525 E Cotati Ave Cotati, CA 94931				
Inquiring Systems Inc	None	P C	Charitable	100,000
101 Brookwood Ave Ste 204 Santa Rosa, CA 95404				
Raw Art Works Inc	None	P C	Charitable	50,000
37 Central Square 2 Lynn, MA 01901				
American Opera Projects Inc	None	P C	Charitable	2,000
138 S Oxford St Ste 1C Brooklyn, NY 11217				
City Growers Inc	None	P C	Charitable	40,000
63 Flushing Ave Bldg 3 Ste 1105 Brooklyn, NY 11205				
Environmental Advocates NY Inc	None	P C	Charitable	35,000
353 Hamilton St Albany, NY 12210				
Harlem Grown Inc	None	P C	Charitable	70,000
77 W 127th St New York, NY 10027				
Nova Institute for Health Inc	None	P C	Charitable	120,000
1407 Fleet St Baltimore, MD 21231				
Ocean Conservation Research Inc	None	P C	Charitable	100,000
PO Box 559 Lagunitas, CA 94938				
Tamerlaine Farm Animal Sanctuary	None	P C	Charitable	20,000
141 Clove Rd Montague, NJ 07827				
di Rosa Preserve	None	P C	Charitable	60,000
5200 Carneros Sonoma Hwy Napa, CA 94559				
Meta-Phys Ed Inc	None	P C	Charitable	5,000
366 41st St Apt 45 Brooklyn, NY 11232				
Theater Labrador Inc	None	P C	Charitable	2,500
109 West 27th Street New York, NY 10001				
Bare Opera Inc	None	P C	Charitable	15,000
2158 35th St Ste 2D Astoria, NY 11105				

Coral Reef Alliance 1330 Broadway Ste 600 Oakland, C A 94612	None	P C	Charitable	25,000
Force Blue Inc 5 Meritt Ct Katonah, NY 10536	None	P C	Charitable	25,000
Jack Arts Inc 20 Putnam Ave Brooklyn, NY 11238	None	P C	Charitable	2,500
Public Assembly Theater Company 5414 Mount Helena Ave Los Angeles, C A 90041	None	P C	Charitable	3,000
Reef Renewal USA Inc 4002 W State St Ste 200 Tampa, FL 33609	None	P C	Charitable	25,000
San Francisco Foundation 1 Embarcadero Ctr Ste 4150 San Francisco, C A 94111	None	P C	Charitable	856,283
StandEarth 548 Market Street 74196 San Francisco, C A 94104	None	P C	Charitable	150,000
Total			3a	5,031,283
b <i>Approved for future payment</i>				
Total			3b	

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 Mental Insight Foundation

EIN: 94-3256579

Software ID: 24020490

Software Version: 2024v5.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	73,364	6,354	0	67,010

TY 2024 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 24020490

Software Version: 2024v5.2

Statement: During the 2024 tax year, The Mental Insight Foundation experienced a substantial contraction within the meaning of the Form 990-PF instructions. The Foundation decided to wind down operations and transfer its remaining assets to aligned charitable organizations in anticipation of terminating its private-foundation status in 2025. Nearly all grant distributions associated with this wind-down were made during the fourth quarter of 2024. The total fair market value of assets distributed during 2024 represented approximately 77 percent of the Foundations beginning-of-year net assets. All distributions were made to qualified 501(c)(3) public charities as described in Statement 12, which lists each recipient organization and the amount granted. The Foundation will complete its termination in 2025, once all remaining administrative matters are finalized. The remaining balance shown at December 31, 2024, is retained solely to cover final administrative expenses and filing obligations.

TY 2024 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 24020490

Software Version: 2024v5.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal Fees	29,590	0	0	29,590

TY 2024 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 24020490

Software Version: 2024v5.2

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Tax Refund Receivable	3,002	3,002	3,002
Accrued Security Income	31,925	144	144
Prepaid Income Tax	43,666	18,615	18,615

TY 2024 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 24020490

Software Version: 2024v5.2

Description	Amount
NT Private Equity Core Fund V Book to Tax	41,421
Prior period adjustment - no tax effect	37,253
NT Private Equity Core Fund III Write-Off	85,591
NT Private Equity Core Fund V Write-Off	476,420

TY 2024 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 24020490

Software Version: 2024v5.2

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
NT Private Equity Fund III Deductions	4,913	4,913		
NT Private Equity Fund V Deductions	11,478	11,478		
UBS Management Fees	35,156	35,156		
Foundation Administration	566,450			566,450
Fees and Licenses	200			200
Insurance	6,973			6,973
Bank Charges	76			75
Travel	5,746			5,745
Client Trust AC	100,000			100,000

TY 2024 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 24020490

Software Version: 2024v5.2

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Private Equity Core Fd. 5	3,931	1,020	
Private Equity Core Fd. 3	1,736	-36	
Wash Sales	53	53	
Sec. Class Action Rec.	31	31	

TY 2024 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 24020490

Software Version: 2024v5.2

Description	Amount
NT Private Equity Core Fund III book to tax	14,929

TY 2024 IRS 990 e-File Render

Name: The Mental Insight Foundation

EIN: 94-3256579

Software ID: 24020490

Software Version: 2024v5.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foreign Taxes	67	67		
Franchise Tax Board	44	44		