

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

Name of foundation JOHN AND MARCIA GOLDMAN FOUNDATION		A Employer identification number 94-3274370
Number and street (or P.O. box number if mail is not delivered to street address) 182 HOWARD STREET 8	Room/suite	B Telephone number (see instructions) (415) 744-8787
City or town, state or province, country, and ZIP or foreign postal code SAN FRANCISCO, CA 94105		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ <u>335,164,392</u>	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	1,353,499			
	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 . . .	5,677,899	5,925,376		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	16,975,588			
	b Gross sales price for all assets on line 6a <u>57,151,790</u>				
	7 Capital gain net income (from Part IV, line 2) . . .		18,662,486		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	26,391	-1,504,730		
	12 Total. Add lines 1 through 11	24,033,377	23,083,132		
	13 Compensation of officers, directors, trustees, etc.	433,366	21,668		411,698
	14 Other employee salaries and wages	571,101	0		571,101
	15 Pension plans, employee benefits	263,477	0		263,477
	16a Legal fees (attach schedule)	12,686	0		12,686
	b Accounting fees (attach schedule)	156,364	104,764		51,600
	c Other professional fees (attach schedule)	788,599	782,552		6,047
	17 Interest	989,690	0		0
	18 Taxes (attach schedule) (see instructions) . . .	409,036	0		64,036
	19 Depreciation (attach schedule) and depletion . . .	1,031,537	0		
	20 Occupancy	117,159	0		117,159
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	251,136	0		251,136
	24 Total operating and administrative expenses. Add lines 13 through 23	5,024,151	908,984		1,748,940
	25 Contributions, gifts, grants paid	10,744,858			8,762,925
	26 Total expenses and disbursements. Add lines 24 and 25	15,769,009	908,984		10,511,865
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	8,264,368			
	b Net investment income (if negative, enter -0-)		22,174,148		
	c Adjusted net income (if negative, enter -0-)				

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		307,225	504,207	504,207
	2	Savings and temporary cash investments		7,343,644	7,272,566	7,272,566
	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		106,465	93,580	93,580
	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)		229,032,669	227,296,871	227,296,871
	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)		56,279,956	65,208,213	65,208,213
	14	Land, buildings, and equipment: basis ▶ <u>38,305,363</u> Less: accumulated depreciation (attach schedule) ▶ <u>4,053,733</u>		35,279,501	34,251,630	34,251,630
15	Other assets (describe ▶ _____)		464,875	537,325	537,325	
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		328,814,335	335,164,392	335,164,392	
Liabilities	17	Accounts payable and accrued expenses		85,123	201,179	
	18	Grants payable		1,661,633	3,643,566	
	19	Deferred revenue.				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)		18,922,637	10,162,313	
	22	Other liabilities (describe ▶ _____)		30,329,452	30,344,652	
	23	Total liabilities (add lines 17 through 22).		50,998,845	44,351,710	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions		276,790,180	290,812,682	
	25	Net assets with donor restrictions		1,025,310	0	
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ 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)		277,815,490	290,812,682	
	30	Total liabilities and net assets/fund balances (see instructions) .		328,814,335	335,164,392	

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	277,815,490
2	Enter amount from Part I, line 27a	2	8,264,368
3	Other increases not included in line 2 (itemize) ▶ _____	3	4,735,895
4	Add lines 1, 2, and 3	4	290,815,753
5	Decreases not included in line 2 (itemize) ▶ _____	5	3,071
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	290,812,682

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 CAPITAL GAIN DISTRIBUTION		P	2024-01-01	2024-12-31
b PUBLICLY TRADED SECURITIES		P	2024-01-01	2024-12-31
c CAPITAL GAIN FROM PARTNERSHIPS		P	2024-01-01	2024-12-31
d				
e				

(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 1,432,080			1,432,080
b 55,194,506		38,489,304	16,705,202
c 525,204			525,204
d			
e			

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

(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), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a			1,432,080
b			16,705,202
c			525,204
d			
e			

2 Capital gain net income or (net capital loss)

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

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

2

3

18,662,486

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 ☐ and enter "N/A" on line 1.		
	Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)	1	308,221
b	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	308,221
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	308,221
6	Credits/Payments:		
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	246,263
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	260,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	506,263
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	0
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	198,042
11	Enter the amount of line 10 to be: Credited to 2025 estimated tax Refunded	11	0

Part VI-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
1a				No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.			No
	<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 0 (2) On foundation managers. ▶ \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
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?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ 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? <i>If "No," attach explanation</i> .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2024 or the taxable year beginning in 2024? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," attach schedule. See instructions.</i>	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i>	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ JMGOLDMANFOUNDATION.ORG	13	Yes	
14	The books are in care of ▶ MARIA KONG Telephone no. ▶ (415) 744-8787 Located at ▶ 182 HOWARD STREET SUITE 8 SAN FRANCISCO CA ZIP+4 ▶ 94105			
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. <i>If "Yes", enter the name of the foreign country</i> ▶	16	Yes	No
				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):		Yes	No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)		No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes	
(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)?	1a(5)		No
(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.)	1a(6)		No
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	1b		No
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?	1d		No
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____	2a		No
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.)	2b		
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?	3a		No
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.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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?	4b		No

Part VI-B

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

5a

During the year did the foundation pay or incur any amount to:
(1) Carry on propaganda, or otherwise attempt to influence legislation (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

5a(2)

No

5a(3)

No

5a(4)

No

5a(5)

No

5b

5d

6a

No

6b

No

7a

No

7b

8

No

Part VII

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

1

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
AMY LYONS 182 HOWARD STREET SUITE 8 SAN FRANCISCO, CA 94105	EXECUTIVE DIRECTOR 37.50	433,366	67,184	0
JOHN D GOLDMAN 182 HOWARD STREET SUITE 8 SAN FRANCISCO, CA 94105	PRESIDENT 4.00	0	0	0
MARCIA L GOLDMAN 182 HOWARD STREET SUITE 8 SAN FRANCISCO, CA 94105	SECRETARY & TREASURER 4.00	0	0	0

2

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SOPHIA COLAMARINO 182 HOWARD STREET SUITE 8 SAN FRANCISCO, CA 94105	DIR, SCI & HEALTH 37.50	223,978	40,437	0
MARIA KONG 182 HOWARD STREET SUITE 8 SAN FRANCISCO, CA 94105	DIR, GRANTS & OPS 37.50	170,212	44,019	0
TARA WILSON 182 HOWARD STREET SUITE 8 SAN FRANCISCO, CA 94105	DIR, YOUTH DEVELOP. 37.50	176,911	29,913	0
Total number of other employees paid over \$50,000.				0

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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
MERCER GLOBAL ADVISORS INC	INVESTMENT MANAGEMENT	633,431
1200 17TH ST 5TH FL DENVER,CO 80202		
PERSHING ADVISOR SOLUTIONS LLC	INVESTMENT MANAGEMENT	148,722
ONE PERSHING PLAZA JERSEY CITY,NJ 07399		
TRAYNOR GROUP	ACCOUNTING	69,519
384 COLUSA AVE SUITE 2 KENSINGTON,CA 94707		
BAKER TILLY US LLP	ACCOUNTING	66,783
PO BOX 7398 MADISON,WI 537077398		

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 EPACENTER ARTS - PROVIDE FREE ART & MUSIC PROGRAMS THAT ENGAGE YOUTH AND ADULTS, AGES 8-25, IN A RANGE OF CREATIVE PROCESSES TO DEVELOP CRITICAL THINKING SKILLS TO SUCCEED.	382,457
2	
3	
4	

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

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

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

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	232,684,577
b	Average of monthly cash balances.	1b	8,402,660
c	Fair market value of all other assets (see instructions).	1c	64,474,701
d	Total (add lines 1a, b, and c).	1d	305,561,938
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	0
3	Subtract line 2 from line 1d.	3	305,561,938
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	4,583,429
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	300,978,509
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	15,048,925

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	15,048,925
2a	Tax on investment income for 2024 from Part V, line 5.	2a	308,221
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	308,221
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	14,740,704
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	14,740,704
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	14,740,704

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	10,511,865
b	Program-related investments—total from Part VIII-B	1b	0
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	10,511,865

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					14,740,704
2 Undistributed income, if any, as of the end of 2024:					
a Enter amount for 2023 only.				0	
b Total for prior years: 20____, 20____, 20____			0		
3 Excess distributions carryover, if any, to 2024:					
a From 2019.					
b From 2020.					3,292,367
c From 2021.					
d From 2022.					
e From 2023.					
f Total of lines 3a through e.		3,292,367			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ 10,511,865					
a Applied to 2023, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see instructions).			0		
c Treated as distributions out of corpus (Election required—see instructions).		0			
d Applied to 2024 distributable amount					10,511,865
e Remaining amount distributed out of corpus		0			
5 Excess distributions carryover applied to 2024. (If an amount appears in column (d), the same amount must be shown in column (a).)		3,292,367			3,292,367
6 Enter the net total of each column as indicated below:					
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		0			
b Prior years' undistributed income. Subtract line 4b from line 2b.			0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed			0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.			0		
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.				0	
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025					936,472
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).		0			
8 Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)		0			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a		0			
10 Analysis of line 9:					
a Excess from 2020					
b Excess from 2021					
c Excess from 2022.					
d Excess from 2023					
e Excess from 2024					

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

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).)

JOHN D GOLDMAN

MARCIA L GOLDMAN

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:

AMY LYONS
182 HOWARD STREET SUITE 8
SAN FRANCISCO, CA 94105
(415) 744-8787

b

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

NONE

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:

NONE

Form 990-PF (2024)

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Part 2 Supplementary Information (continued)		During the Year or Approved for Future Payment		
Grants and Contributions Paid				
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 Paid during the year				
AMALGAMATED CHARITABLE FOUNDATION INC 1825 K ST NW WASHINGTON,DC 200061202	NONE	PC	YOUTH POWER FUND	250,000
AMBITION ANGELS 1265 BEECH STREET E PALO ALTO,CA 94303	NONE	PC	MIDPENINSULA OUTREACH AND EXPANSION EFFORTS	20,000
AMERICAN CONSERVATORY THEATRE FOUNDATION 415 GEARY ST SAN FRANCISCO,CA 941021222	NONE	PC	2024 ANNUAL GRANT	10,000
AMERICAN JEWISH WORLD SERVICE INC 45 WEST 36TH STREET 10TH FLR NEW YORK,NY 100187641	NONE	PC	2024 ANNUAL GRANT FOR GENERAL SUPPORT AND DISASTER RELIEF AND DEVELOPMENT	40,000
AMERICAN NATIONAL RED CROSS 431 18TH ST NW WASHINGTON,DC 200065310	NONE	PC	2024 ANNUAL GRANT FOR DISASTER RELIEF IN UNITED STATES	50,000
AMERICAN SYMPHONY ORCHESTRA LEAGUE 520 8TH AVENUE SUITE 2203 NEW YORK,NY 100184167	NONE	PC	2024 ANNUAL GRANT	15,000
ARTHOUSE STUDIO 50 CLAYTON AVE SAN JOSE,CA 951102206	NONE	PC	MENTAL HEALTH & SOCIAL EMOTIONAL LEARNING PROGRAMS	35,000
ARTICLEGROUP ORG INC 1948 NORTH ALVARADO STREET LOS ANGELES,CA 90039	NONE	PC	"SAVE THE HUMANS" CLIMATE COMMUNICATIONS PROGRAM	225,000
ASIAN ART MUSEUM FOUNDATION OF SAN FRANCISCO 200 LARKIN ST SAN FRANCISCO,CA 941024734	NONE	PC	2024 ANNUAL GRANT	5,000
BAY AREA CANCER CONNECTIONS 1511 S CLAREMONT ST SAN MATEO,CA 944022120	NONE	PC	30TH ANNIVERSARY FOUNDERS FUND	100,000
BAY AREA DISCOVERY MUSEUM 557 MCREYNOLDS RD SAUSALITO,CA 949652601	NONE	PC	SCHOOL AND COMMUNITY PROGRAMS	10,000
BERKELEY ATHLETIC FUND PO BOX 11525 BERKELEY,CA 947122525	NONE	PC	GENERAL SUPPORT	195
BERKELEY REPERTORY THEATRE 999 HARRISON ST BERKELEY,CA 947101455	NONE	PC	GENERAL SUPPORT	250
BUILDING OPPORTUNITIES FOR SELF- SUFFICIENCY 1918 UNIVERSITY AVE 4 FL BERKELEY,CA 947047350	NONE	PC	GENERAL SUPPORT	100
BUSINESSES UNITED IN INVESTING LEENDING AND DEVELOPMENT PO BOX 3316 REDWOOD CITY,CA 940643316	NONE	PC	2024 ANNUAL GRANT FOR BAY AREA PROGRAMS	10,000
CALIFORNIA ACADEMY OF SCIENCES 55 MUSIC CONCOURSE DR SAN FRANCISCO,CA 941184503	NONE	PC	CAREERS IN SCIENCE	15,000
CALIFORNIA ACADEMY OF SCIENCES 55 MUSIC CONCOURSE DR SAN FRANCISCO,CA 941184503	NONE	PC	2024 ANNUAL GRANT	50,000
CENTER FOR CARBON REMOVAL 1140 3RD STREET NE WASHINGTON,DC 200026274	NONE	PC	GENERAL SUPPORT	100,000
CHRONICLE SEASON OF SHARING FUND 901 MISSION ST SAN FRANCISCO,CA 941032905	NONE	PC	2024 ANNUAL GRANT FOR BAY AREA PROGRAMS	5,000
COLLEGE TRACK 483 9TH STREET SUITE 200 OAKLAND,CA 94607	NONE	PC	OPENING NEW STEAM EDUCATION ENDOWMENTS	100
COMMUNITY FOUNDATION OF LORAIN COUNTY 9080 LEAVITT RD ELYRIA,OH 440354210	NONE	PC	GENERAL SUPPORT	5,000
COMMUNITY INITIATIVES 1000 BROADWAY STE 480 OAKLAND,CA 946074044	NONE	PC	GENERAL SUPPORT	10,000
COMMUNITY SCIENCE WORKSHOP NETWORK 131 N 5TH ST CHOWCHILLA,CA 936102820	NONE	PC	GENERAL SUPPORT	10,000
CONGREGATION EMANU-EL 2 LAKE ST SAN FRANCISCO,CA 941181423	NONE	PC	EMANU-EL NEXT: INVESTING FOR OUR JEWISH FUTURE	250,000
CONGREGATION EMANU-EL 2 LAKE ST SAN FRANCISCO,CA 941181423	NONE	PC	EMANU-EL NEXT: INVESTING FOR OUR JEWISH FUTURE	250,000
CONTEMPORARY JEWISH MUSEUM 736 MISSION ST SAN FRANCISCO,CA 941033113	NONE	PC	2024 ANNUAL GRANT	5,000
CORPORATION OF THE FINE ARTS MUSEUMS 50 HAGIWARA TEA GARDEN DR SAN FRANCISCO,CA 941184502	NONE	PC	2024 ANNUAL GRANT	5,000
CURIODYSSEY 1651 COYOTE POINT DR SAN MATEO,CA 944011002	NONE	PC	2024 ANNUAL GRANT	5,000
EARTHJUSTICE 50 CALIFORNIA ST STE 500 SAN FRANCISCO,CA 941114608	NONE	PC	CLIMATE AND ENERGY PROGRAM	50,000
EASTSIDE COLLEGE PREPARATORY SCHOOL INC 1041 MYRTLE ST E PALO ALTO,CA 943032013	NONE	PC	2024 ANNUAL GRANT	10,000
ENVIRONMENTAL LAW ALLIANCE WORLDWIDE 1412 PEARL ST EUGENE,OR 974014036	NONE	PC	CLIMATE PROGRAM	50,000
EPACENTER 1950 BAY RD E PALO ALTO,CA 943031313	NONE	PC	GENERAL SUPPORT	1,400,000
EPACENTER 1950 BAY RD E PALO ALTO,CA 943031313	NONE	PC	ANNUAL FUND	100
EVERYTOWN FOR GUN SAFETY SUPPORT FUND INC PO BOX 4184 NEW YORK,NY 101630000	NONE	PC	GENERAL SUPPORT	10,000
FIND YOUR LIGHT FOUNDATION PO BOX 48290 LOS ANGELES,CA 90048	NONE	PC	GENERAL SUPPORT	200,000
FOODWISE COMMUNITY 1 FERRY BUILDING STE 250 SAN FRANCISCO,CA 941114231	NONE	PC	GENERAL SUPPORT	5,000
FOODWISE COMMUNITY 1 FERRY BUILDING STE 250 SAN FRANCISCO,CA 941114231	NONE	PC	2024 SUNDAY SUPPER	12,000
FRIENDS OF THE PALO ALTO JR MUSEUM AND ZOO 1451 MIDDLEFIELD RD PALO ALTO,CA 943013351	NONE	PC	2024 ANNUAL GRANT	10,000
GLEN PARK PARENT TEACHER ORGANIZATION 151 LIPPARD AVE SAN FRANCISCO,CA 941313249	NONE	PC	GENERAL SUPPORT	7,500
GOLDEN GATE STEM FAIR 28 PLAZA DEMIRA NOVATO,CA 949474011	NONE	PC	GENERAL SUPPORT	3,000
HOPE SERVICES 30 LAS COLINAS LN SAN JOSE,CA 951191212	NONE	PC	MENTAL HEALTH & SOCIAL-EMOTIONAL LEARNING PROGRAMS	75,000
ILLUMINATE THE ARTS 228 LAIDLEY STREET SAN FRANCISCO,CA 949013252	NONE	PC	2024 ANNUAL GRANT	10,000
ILLUMINATE THE ARTS 228 LAIDLEY STREET SAN FRANCISCO,CA 949013252	NONE	PC	SUPPORT FOR FREE CONCERTS AT THE GOLDEN GATE BANDSHELL FOR THE 2024 SEASON	50,000
IMMIGRANT LEGAL RESOURCE CENTER 1458 HOWARD STREET SAN FRANCISCO,CA 94103	NONE	PC	UNITED COALITION FOR IMMIGRATION SERVICES	200,000
INTERNATIONAL RESCUE COMMITTEE INC 122 E 42ND ST 12TH FLOOR NEW YORK,NY 101681299	NONE	PC	2024 ANNUAL GRANT	10,000
JASPER RIDGE FARM PO BOX 620924 WOODSIDE,CA 94062	NONE	PC	MENTAL HEALTH & SOCIAL-EMOTIONAL LEARNING PROGRAMS	35,000
JEWISH COMMUNITY FEDERATION OF SF MARIN PENINSULA & SONOMA COUNTIES 121 STEUART ST SAN FRANCISCO,CA 941051236	NONE	PC	REPLENISH DAF FOR LORAIN COUNTY SCHOLARS FUND	20,000
JEWISH COMMUNITY FEDERATION OF SF MARIN PENINSULA & SONOMA COUNTIES 121 STEUART ST SAN FRANCISCO,CA 941051236	NONE	PC	REPLENISH DAF FOR LORAIN SCHOOL STEAM EDUCATION ENDOWMENTS	156,000
JEWISH COMMUNITY FEDERATION OF SF MARIN PENINSULA & SONOMA COUNTIES 121 STEUART ST SAN FRANCISCO,CA 941051236	NONE	PC	CONTRIBUTION TO THE AARON GOLDMAN PHILANTHROPIC FUND	100,000
JEWISH COMMUNITY FEDERATION OF SF MARIN PENINSULA & SONOMA COUNTIES 121 STEUART ST SAN FRANCISCO,CA 941051236	NONE	PC	2024 ANNUAL CAMPAIGN	250,000
JEWISH COMMUNITY RELATIONS COUNCIL OF SAN FRANCISCO MARIN & PENINSULA 121 STEUART ST STE 301 SAN FRANCISCO,CA 941051221	NONE	PC	2024 ANNUAL GRANT	25,000
JEWISH VOCATIONAL & CAREER COUNSELING SERVICE 548 MARKET ST PMB 37733 SAN FRANCISCO,CA 941045401	NONE	PC	2024 ANNUAL GRANT	30,000
JOHN F KENNEDY CENTER FOR THE PERFORMING ARTS 2700 F ST NW WASHINGTON,DC 205660001	NONE	PC	UNRESTRICTED CONTRIBUTION TO THE TOGETHER FOR THE ARTS ENDOWMENT CAMPAIGN	500,000
KARA 457 KINGSLEY AVE PALO ALTO,CA 943013222	NONE	PC	MENTAL HEALTH & SOCIAL-EMOTIONAL LEARNING PROGRAMS	50,000
KIPP BAY AREA SCHOOLS 1000 BROADWAY STE 460 OAKLAND,CA 946074033	NONE	PC	2024 ANNUAL GRANT	5,000
KQED INC 2601 MARIPOSA ST SAN FRANCISCO,CA 941101426	NONE	PC	ANNUAL FUND	200
KQED INC 2601 MARIPOSA ST SAN FRANCISCO,CA 941101426	NONE	PC	2024 ANNUAL GRANT	25,000
LIFEMOVES 181 CONSTITUTION DR MENLO PARK,CA 940251106	NONE	PC	2024 ANNUAL GRANT	25,000
LUCILE PACKARD FOUNDATION FOR CHILDRENS HEALTH 400 HAMILTON AVE STE 340 PALO ALTO,CA 943011805	NONE	PC	TO CREATE A NEW ENDOWMENT CALLED THE GOLDMAN AUTISM FUND TO SUPPORT THE STANFORD EARLY INTERVENTION PROGRAM FOR AUTISM	1,655,000
LUCILE PACKARD FOUNDATION FOR CHILDRENS HEALTH 400 HAMILTON AVE STE 340 PALO ALTO,CA 943011805	NONE	PC	EARLY SUPPORT PROGRAM FOR AUTISM	502,000
LUCILE PACKARD FOUNDATION FOR CHILDRENS HEALTH 400 HAMILTON AVE STE 340 PALO ALTO,CA 943011805	NONE	PC	2024 ANNUAL GRANT FOR THE CHILDRENS FUND	10,000
LUPUS RESEARCH ALLIANCE INC 270 MADISON AVE RM 300 NEW YORK,NY 100160611	NONE	PC	GENERAL SUPPORT	10,000
LUPUS RESEARCH ALLIANCE INC 270 MADISON AVE RM 300 NEW YORK,NY 100160611	NONE	PC	2024 ANNUAL GRANT	25,000
MERCURY SOUL INC 130 NEWTON DR BURLINGAME,CA 940105929	NONE	PC	2024 ANNUAL GRANT	25,000
MINDFUL LIFE PROJECT 1001 CANAL BLVD STE A RICHMOND,CA 948043524	NONE	PC	MENTAL HEALTH & SOCIAL-EMOTIONAL LEARNING	50,000
MUTTVILLE 222 6TH STREET KANSAS CITY,MO 641630000	NONE	PC	CAPITAL CAMPAIGN	100,000
NATIONAL KIDNEY FOUNDATION INC 30 EAST 33RD STREET NEW YORK,NY 100165337	NONE	PC	PROJECT ECHO WAITLIST MANAGEMENT PILOT	20,000
NATIONAL KIDNEY FOUNDATION INC 30 EAST 33RD STREET NEW YORK,NY 100165337	NONE	PC	2024 ANNUAL GRANT	10,000
NATURAL RESOURCES DEFENSE COUNCIL INC 40 WEST 20TH STREET NEW YORK,NY 100114211	NONE	PC	GENERAL SUPPORT	100
NEW ISRAEL FUND 6 E 39TH ST STE 301 NEW YORK,NY 100160456	NONE	PC	GENERAL SUPPORT	180
ODC INC 351 SHOTWELL ST SAN FRANCISCO,CA 941101324	NONE	PC	DEVELOPMENT CAPACITY GRANT	50,000
ODC INC 351 SHOTWELL ST SAN FRANCISCO,CA 941101324	NONE	PC	GENERAL SUPPORT	5,000
ODC INC 351 SHOTWELL ST SAN FRANCISCO,CA 941101324	NONE	PC	2024 ANNUAL GRANT	10,000
ODC INC 351 SHOTWELL ST SAN FRANCISCO,CA 941101324	NONE	PC	GENERAL SUPPORT	5,000
ONEGOAL 180 N WABASH AVE STE 800 CHICAGO,IL 606013608	NONE	PC	2024 ANNUAL GRANT	15,000
OSHMAN FAMILY JEWISH COMMUNITY CENTER 3921 FABIAN WAY PALO ALTO,CA 943034606	NONE	PC	2024 ANNUAL GRANT	25,000
PARTNERS IN HEALTH A NONPROFIT CORPORATION 800 BOYLSTON ST STE 300 BOSTON,MA 021997032	NONE	PC	2024 ANNUAL GRANT	10,000
PENINSULA BRIDGE PROGRAM 177 BOVET RD SUITE 120 SAN MATEO,CA 944023116	NONE	PC	2024 ANNUAL GRANT	100,000
PENINSULA OPEN SPACE TRUST 222 HIGH ST PALO ALTO,CA 943011040	NONE	PC	GENERAL SUPPORT	10,000
PENINSULA OPEN SPACE TRUST 222 HIGH ST PALO ALTO,CA 943011040	NONE	PC	GENERAL SUPPORT	150
PEOPLE FOR THE AMERICAN WAY FOUNDATION 1101 15TH ST NW STE 600 WASHINGTON,DC 200055023	NONE	PC	SCIENCE RESOURCE GRANTS	15,000
PHILANTHROPIC VENTURES FOUNDATION 1222 PRESERVATION PARK WAY OAKLAND,CA 946121204	NONE	PC	GENERAL SUPPORT	10,000
PROJECT OPEN HAND 730 POLK ST 3RD FLOOR SAN FRANCISCO,CA 941097813	NONE	PC	GENERAL SUPPORT	7,500
PTA CALIFORNIA CONGRESS OF PARENTS TEACHERS & STUDENTS INC 220 MIDDLEFIELD DRIVE SAN FRANCISCO,CA 941320000	NONE	PC	GENERAL SUPPORT	1,200
PTA CALIFORNIA CONGRESS OF PARENTS TEACHERS & STUDENTS INC 2425 STUART ST BERKELEY,CA 947051115	NONE	PC	GENERAL SUPPORT	5,000
RANDALL MUSEUM FRIENDS 199 MUSEUM WAY SAN FRANCISCO,CA 941141429	NONE	PC	GENERAL SUPPORT	75,000
RAVENSWOOD EDUCATION FOUNDATION 2120 EUCLID AVE E PALO ALTO,CA 943031703	NONE	PC	CERTIFICATED ARTS TEACHERS AND TEACHER TALENT INITIATIVE FOR RCSD	150,000
REDWOOD CITY EDUCATION FOUNDATION PO BOX 3046 REDWOOD CITY,CA 94064	NONE	PC	MENTAL HEALTH & SOCIAL-EMOTIONAL LEARNING PROGRAMS	75,000
ROSE FOUNDATION FOR COMMUNITIES AND THE ENVIRONMENT 201 4TH ST APT 102 OAKLAND,CA 946074369	NONE	PC	GENERAL SUPPORT	1,200
SAN FRANCISCO BALLET ASSOCIATION 455 FRANKLIN ST 3RD FLR SAN FRANCISCO,CA 941024438	NONE	PC	2024 ANNUAL GRANT	10,000
SAN FRANCISCO BOTANICAL GARDEN SOCIETY AT STRYBYNG ARBORETUM 1199 9TH AVE SAN FRANCISCO,CA 941222370	NONE	PC	FLOWER PIANO 2024	35,000
SAN FRANCISCO CONSERVATORY OF MUSIC INC 50 OAK ST SAN FRANCISCO,CA 941026011	NONE	PC	DISTINGUISHED PROFESSORSHIP FOR MICHAEL TILSON THOMAS	50,000
SAN FRANCISCO FRIENDS SCHOOL 250 VALENCIA ST SAN FRANCISCO,CA 941032322	NONE	PC	2024 ANNUAL FUND GIFT	15,000
SAN FRANCISCO JAZZ ORGANIZATION 201 FRANKLIN ST SAN FRANCISCO,CA 941025108	NONE	PC	2024 ANNUAL GRANT	10,000
SAN FRANCISCO JEWISH COMM PUBLICATIONS 131 STEUART ST STE 600 SAN FRANCISCO,CA 941051238	NONE	PC	2024 ANNUAL GRANT	5,000
SAN FRANCISCO MUSEUM OF MODERN ART 151 3RD ST SAN FRANCISCO,CA 941033107	NONE	PC	2024 ANNUAL GRANT	10,000
SAN FRANCISCO OPERA ASSOCIATION 301 VAN NESS AVE SAN FRANCISCO,CA 941024509	NONE	PC	2024 ANNUAL GRANT	250,000
SAN FRANCISCO SYMPHONY 201 VAN NESS AVE SAN FRANCISCO,CA 941024507	NONE	PC	DSH RENOVATION AND TREASURE ISLAND CONCEPT	150,000
SAN FRANCISCO SYMPHONY 201 VAN NESS AVE SAN FRANCISCO,CA 941024507	NONE	PC	2024 ANNUAL GRANT	15,000
SCHMAHL SCIENCE WORKSHOPS 1650 SENTER RD SAN JOSE,CA 951122599	NONE	PC	GENERAL SUPPORT	15,000
SCIENCE FROM SCIENTISTS INC 16 TOWER OFFICE PARK WOBURN,MA 018012113	NONE	PC	GENERAL SUPPORT	10,000
SCIENCE IS ELEMENTARY INC 2483 OLD MIDDLEFIELD WAY SUITE 170 MOUNTAIN VIEW,CA 940432359	NONE	PC	GENERAL SUPPORT	10,000
SECOND HARVEST OF SILICON VALLEY 4001 N FIRST STREET SAN JOSE,CA 95134	NONE	PC	2024 ANNUAL GRANT	20,000
SHOTGUN PLAYERS INC 1901 ASHBY AVE BERKELEY,CA 947032505	NONE	PC	GENERAL SUPPORT	250
SILK ROAD PROJECT INC PO BOX 35460 BRIGHTON,MA 02135	NONE	PC	2024 ANNUAL GRANT	10,000
SPHINX ORGANIZATION INC 2200 HUNT ST STE 461 DETROIT,MI 482075603	NONE	PC	2024 ANNUAL GRANT	10,000
STERN GROVE FESTIVAL ASSOCIATION 2 MARINA BOULEVARD BUILDING C SUITE 370 SAN FRANCISCO,CA 94123	NONE	PC	2024 ANNUAL GRANT	25,000
SUNDAY FRIENDS FOUNDATION 645 WOOL CREEK DR 2ND FL STE A SAN JOSE,CA 951120000	NONE	PC	DREAM. BUILD.MENTOR PROGRAM	20,000
THE ALAMEDA COUNTY COMMUNITY FOOD BANK INC PO BOX 2599 OAKLAND,CA 946140599	NONE	PC	GENERAL SUPPORT	150
THE BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNIVERSITY 450 JANE STANFORD WAY STANFORD,CA 943052004	NONE	PC	SPONSORSHIP OF BING FLING 2025	75,000
THE BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNIVERSITY 450 JANE STANFORD WAY STANFORD,CA 943052004	NONE	PC	HAAS CENTER FOR PUBLIC SERVICE	5,000
THE EXPLORATORIUM PIER 17 SUITE 100 SAN FRANCISCO,CA 941110000	NONE	PC	2024 ANNUAL GRANT	10,000
THE NATIONAL CENTER FOR SCIENCE EDUCATION INC 230 GRAND AVENUE SUITE 101 OAKLAND,CA 946104589	NONE	PC	GENERAL SUPPORT	15,000
THEATREWORKS SILICON VALLEY 901 SHASTA ST REDWOOD CITY,CA 940632127	NONE	PC	2024 ANNUAL GRANT	30,000
TIDES CENTER 1014 TORNEY AVENUE SAN FRANCISCO,CA 941291755	NONE	PC	YOUTH ART EXCHANGE	250
TIPPING POINT COMMUNITY 220 MONTGOMERY ST STE 850 SAN FRANCISCO,CA 941043452	NONE	PC	2024 ANNUAL GRANT	10,000
TIPPING POINT COMMUNITY 220 MONTGOMERY ST STE 850 SAN FRANCISCO,CA 941043452	NONE	PC	GENERAL SUPPORT	5,000
TRUST FOR PUBLIC LAND 23 GEARY ST STE 1000 SAN FRANCISCO,CA 941085750	NONE	PC	INDIA BASIN WATERFRONT PARK INITIATIVE SPECIFICALLY TO SUPPORT THE FIRST TWO YEARS OF THE LIVE EVENTS SERIES, PRESENTING A SERIES OF 6 TO 10 SMALL PERFORMANCES HIGHLIGHTING LOCAL PERFORMERS	50,000
UNION OF CONCERNED SCIENTISTS INC 2001 ADDISON STREET SUITE 200 BERKELEY,CA 94704	NONE	PC	SUPPORT FOR VARIOUS CLIMATE FOCUSED PROGRAMS	50,000
UNITED STATES OLYMPIC & PARALYMPIC COMMITTEE 1 OLYMPIC PLAZA COLORADO SPRINGS,CO 809095780	NONE	PC	ENDOWMENT TO FUND A U.S. OLYMPIC ATHLETE ENDOWMENT	100,000
UNITED WAY OF THE BAY AREA 550 KEARNY ST STE 510 SAN FRANCISCO,CA 941082524	NONE	PC	2024 ANNUAL GRANT	10,000
UNIVERSITY OF CALIFORNIA SAN FRANCISCO FOUNDATION 2001 THE EMBARCADERO 3RD FLOOR SAN FRANCISCO,CA 941435200	NONE	PC	GENERAL SUPPORT	15,000
URBAN SCHOOL OF SAN FRANCISCO 1563 PAGE ST SAN FRANCISCO,CA 941172017	NONE	PC	ANNUAL FUND	500
WORLD CENTRAL KITCHEN INCORPORATED 200 MASSACHUSETTS AVE NW 7TH FLR WASHINGTON,DC 200011429	NONE	PC	2024 ANNUAL GRANT FOR THE MIDLE EAST PROGRAM	25,000
Total			► 3a	8,762,925
b Approved for future payment				
CALIFORNIA ACADEMY OF SCIENCES 55 MUSIC CONCOURSE DR SAN FRANCISCO,CA 941184503	NONE	PC	EDUCATION DIVISION	1,000,000
KENNEDY CENTER FOR THE PERFORMING ARTS 2700 F ST NW WASHINGTON,DC 205660001	NONE	PC	UNRESTRICTED FOR TOGETHER FOR THE ARTS ENDOWMENT CAMPAIGN	2,000,000
RAVENSWOOD EDUCATION FOUNDATION 2120 EUCLID AVE E PALO ALTO,CA 943031703	NONE	PC	RCSD ARTS TEACHERS/TEACHER TALENT INITIATIVE	150,000
SAN FRANCISCO CONSERVATORY OF MUSIC INC 50 OAK ST SAN FRANCISCO,CA 941026011	NONE	PC	DISTINGUISHED PROFESSORSHIP FOR MTT	50,000
Total			► 3b	3,200,000
				Form 990-PF (2024)

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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		14	5,677,899	
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		18	16,975,588	
9 Net income or (loss) from special events:				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue:				
a REFUNDS _____		01	23,570	
b SETTLEMENT INCOME _____		01	1,463	
c FLASH NETWORKS DISTRIBUTION _____		01	1,358	
d _____				
e _____				
12 Subtotal. Add columns (b), (d), and (e) . .	0		22,679,878	0
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)		13	22,679,878	22,679,878

[illegible]

Part XVI

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

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

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

(1) Cash.

(2) Other assets.

b Other transactions:

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

(2) Purchases of assets from a noncharitable exempt organization

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

(4) Reimbursement arrangements.

(5) Loans or loan guarantees.

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

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

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

[illegible]

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

b If "Yes," complete the following schedule.

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

Sign Here

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

	2025-11-14
Signature of officer or trustee	Date

2025-11-14

Title

May the IRS discuss this return with the preparer shown below?
See instructions. ☐ Yes ☐ No

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	BRIAN YACKER		2025-11-14		P00401346
	Firm's name ▶ BAKER TILLY ADVISORY GROUP LP				Firm's EIN ▶ 39-085991
	Firm's address ▶ 18500 VON KARMAN AVE 10TH FLOOR IRVINE, CA 92612				Phone no. (949) 222-2999

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B (Form 990) (Rev. January 2025) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.	OMB No. 1545-0047
Name of the organization JOHN AND MARCIA GOLDMAN FOUNDATION		Employer identification number 94-3274370

Organization type (check one):

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization JOHN AND MARCIA GOLDMAN FOUNDATION	Employer identification number 94-3274370
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Part I

Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	JOHN AND MARCIA GOLDMAN 42 SERRANO DRIVE ATHERTON, CA 94027	\$ 1,352,645	☒ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
JOHN AND MARCIA GOLDMAN FOUNDATION

Employer identification number
94-3274370

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	SECURITIES	\$ 656,791	2024-12-20
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	

Name of organization JOHN AND MARCIA GOLDMAN FOUNDATION	Employer identification number 94-3274370
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Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c) (7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) \$

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	

Additional Data

[Return to Form](#)

Software ID:

Software Version:

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION
EIN: 94-3274370

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	156,364	104,764		51,600

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: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

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
LAND		3,186,092		L		0	0		
BUILDING	2021-01-01	34,671,792	2,815,203	SL	39.000000000000	956,345	0		
COMPUTER EQUIPMENT	2017-11-30	118,078	72,850	SL	4.000000000000	28,763	0		
FURNITURE AND EQUIPMENT	2021-01-01	329,401	134,143	SL	7.000000000000	46,429	0		

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	227,296,871	227,296,871

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
OTHER INVESTMENTS	FMV	65,208,213	65,208,213

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
LAND	3,186,092	0	3,186,092	3,186,092
BUILDING	34,671,792	3,771,548	30,900,244	30,900,244
COMPUTER EQUIPMENT	118,078	101,613	16,465	16,465
FURNITURE AND EQUIPMENT	329,401	180,572	148,829	148,829

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	12,686	0		12,686

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTEREST AND DIVIDENDS RECEIVABLE	69,118	65,012	65,012
OTHER RECEIVABLES	25,166	40,630	40,630
DEFERRED COMPENSATION PLAN	367,525	431,683	431,683
ORGANIZATION COSTS	3,066		

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Description	Amount
PRIOR PERIOD ADJUSTMENT	3,071

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MEMBERSHIPS	23,000	0		23,000
OFFICE EXPENSE	14,191	0		14,191
INSURANCE	170,425	0		170,425
IT	33,990	0		33,990
TRAVEL	3,431	0		3,431
MEAL	13	0		13
CONFERENCE	3,898	0		3,898
LOSS ON DISPOSAL	2,188	0		2,188

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP INVESTMENT LOSS	0	-1,506,193	0
REFUNDS	23,570	0	0
SETTLEMENT INCOME	1,463	1,463	1,463
FLASH NETWORKS DISTRIBUTION	1,358		1,358

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Description	Amount
UNREALIZED GAIN	4,698,021
AMORTIZATION OF BUILDING LEASE	37,874

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Description	Beginning of Year - Book Value	End of Year - Book Value
GRANTS PAYABLE (LEASE)	28,783,843	28,745,969
FEDERAL EXCISE TAXES PAYABLE	27,000	73,000
DEFERRED FEDERAL EXCISE TAXES	1,034,000	1,094,000
DEFERRED COMPENSATION	376,284	431,683
FSA LIABILITIES	1,725	0
ACCRUED VACATION PAYABLE	106,600	0

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION

EIN: 94-3274370

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL PROCESSING FEES	5,216	0		5,216
CONSULTING	831	0		831
INVESTMENT MANAGEMENT FEES	782,552	782,552		0

TY 2024 IRS 990 e-File Render

Name: JOHN AND MARCIA GOLDMAN FOUNDATION
EIN: 94-3274370

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	345,000	0		0
PROPERTY TAX	64,036	0		64,036