Form **990-PF**

Department of the Treasury Internal Revenue Service

EXTENDED TO NOVEMBER 15, 2024 Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation Do not enter social security numbers on this form as it may be made public. Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047 2023 Open to Public Inspection

For calendar year 2023 or tax year beginning , and ending						
Name of foundation					A Employer identification	number
		ELI FOUNDATION	33-0758237			
		nd street (or P.O. box number if mail is not delivered to street a	B Telephone number			
		E. COAST HIGHWAY		300	949-760-4300	
		own, state or province, country, and ZIP or foreign p IA DEL MAR, CA 92625	ostal code		C If exemption application is p	ending, check here
G C	heck	all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organizations	s, check here
		Final return	Amended return		0	
		Address change	Name change		 Foreign organizations me check here and attach co 	eting the 85% test, mputation
H C	heck	type of organization: X Section 501(c)(3) ex	empt private foundation		E If private foundation sta	tus was terminated
	Se	ction 4947(a)(1) nonexempt charitable trust	Other taxable private founda	tion	under section 507(b)(1)	(A), check here
I Fa	ir ma	arket value of all assets at end of year J Accounting	-	Accrual	F If the foundation is in a	60-month termination
(fr			her (specify)		under section 507(b)(1)	(B), check here
	\$	45,536,119. (Part I, colun	in (d), must be on cash basi	S.)		
Pa	rt 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).)	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc., received	53,200,812.		N/A	
	2	Check if the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments	719,492.	719,492.		STATEMENT 1
	4	Dividends and interest from securities				
	5a	Gross rents				
	-	Net rental income or (loss)	22.460			
ē	6a	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all 53, 235, 093	33,160.			STATEMENT 2
enu	b	assets on line 6a		F2 10F F21		
Revenue	7	Capital gain net income (from Part IV, line 2)		53,105,531.		
_	8	Net short-term capital gain				
	9	Income modifications Gross sales less returns				
		Less: Cost of goods sold				
		Gross profit or (loss)				
	11	Other income				
	12	Total. Add lines 1 through 11	53,953,464.	53,825,023.		
	13	Compensation of officers, directors, trustees, etc.	940,874.	188,175.		752,699.
	14	Other employee salaries and wages	1,128,474.	225,695.		902,780.
	15	Pension plans, employee benefits	214,700.	42,940.		171,760.
ses	16a	Legal fees 3	96,952.	24,238.		38,781.
ens	b	Accounting fees STMT 4	26,475.	6,619.		10,590.
Expenses	C	Other professional fees STMT 5	865,525.	0.		817,525.
	17	Interest				
Administrative		Taxes STMT 6	32,805.	0.		0.
nist	19	Depreciation and depletion	5,290.	0.		
dmi	20		1,000.	500.		0.
	21	Travel, conferences, and meetings	84,847.	40,406.		44,441.
and	22	Printing and publications	147,491.	59,881.		19,026.
Operating	23 24	Other expenses STMT 7 Total operating and administrative	±=/,421.	55,001.		19,020.
erat	24	expenses. Add lines 13 through 23	3,544,433.	588,454.		2,757,602.
Ő	25	Contributions, gifts, grants paid	34,546,542.			34,546,542.
	26	Total expenses and disbursements.	, , , , . <u>-</u> - •			, <u>, , , ,</u>
		Add lines 24 and 25	38,090,975.	588,454.		37,304,144.
	27	Subtract line 26 from line 12:	. ,	,		
		Excess of revenue over expenses and disbursements	15,862,489.			
		Net investment income (if negative, enter -0-)		53,236,569.		
		Adjusted net income (if negative, enter -0-)			N/A	
ΙНΔ		or Paperwork Reduction Act Notice see instruction	S 222501 12 20 22			Form 990-PF (2023)

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Form S (2023)

art II	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	year
artii	column should be for end-of-year amounts only.	(a) Book Value	(b) Book Value	(c) Fair Market Value
1 Ca	ash - non-interest-bearing			
2 Sa	avings and temporary cash investments	29,654,114.	45,466,493.	45,466,49
3 Ac	ccounts receivable			
Le	ess: allowance for doubtful accounts			
	ledges receivable			
Le	ess: allowance for doubtful accounts			
5 Gr	rants receivable			
	eceivables due from officers, directors, trustees, and other			
di	squalified persons			
7 Oth	her notes and loans receivable			
	ess: allowance for doubtful accounts			
8 In	ventories for sale or use			
	repaid expenses and deferred charges			
10a In	vestments - U.S. and state government obligations			
b In	vestments - corporate stock			
c In	vestments - corporate bonds			
11 Inv	vestments - land, buildings, and equipment: basis			
	ss: accumulated depreciation			
	vestments - mortgage loans			
	vestments - other			
	and, buildings, and equipment: basis 49 , 448 .			
Les	ss: accumulated depreciation STMT 8 36,343.	7,533.	13,105.	13,10
	ther assets (describe STATEMENT 9)	13,493.	56,521.	56,52
16 To	otal assets (to be completed by all filers - see the			
in	structions. Also, see page 1, item I)	29,675,140.	45,536,119.	45,536,11
17 Ac	ccounts payable and accrued expenses			
18 Gr	rants payable			
19 De	eferred revenue			
	pans from officers, directors, trustees, and other disqualified persons			
21 M	ortgages and other notes payable			
22 Ot	ther liabilities (describe OTHER LIABILITIES)	2,055.	545.	
23 To	otal liabilities (add lines 17 through 22)	2,055.	545.	
Fo	oundations that follow FASB ASC 958, check here			
ar	nd complete lines 24, 25, 29, and 30.			
24 Ne	et assets without donor restrictions	29,673,085.	45,535,574.	
25 Ne	et assets with donor restrictions			
Fo	oundations that do not follow FASB ASC 958, check here			
	nd complete lines 26 through 30.			
	apital stock, trust principal, or current funds			
27 Pa	aid-in or capital surplus, or land, bldg., and equipment fund			
28 Re	etained earnings, accumulated income, endowment, or other funds \dots			
29 To	otal net assets or fund balances	29,673,085.	45,535,574.	
30 To	otal liabilities and net assets/fund balances	29,675,140.	45,536,119.	
art III	Analysis of Changes in Net Assets or Fund Bala	ances		
Total ne	et assets or fund balances at beginning of year - Part II, column (a), line 29)		
	gree with end-of-year figure reported on prior year's return)		1	29,673,08
	nount from Part I, line 27a			15,862,48
Enter ar				
	icreases not included in line 2 (itemize)		3	

5	Decreases not included in line 2 (itemize)	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	45,535,574.
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(====)	ELI FOUNDATION						33-07582	237 Page 3
Part IV Capital Gains	and Losses for Tax on In	vestment I	ncom					
						(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)	
1a 3520 SHARES OF BROADC	1a 3520 SHARES OF BROADCOM STOCK D							10/04/23
b 14823 SHARES OF BROAD	COM STOCK					D	12/13/23	12/13/23
c 14549 SHARES OF BROAD	COM STOCK					D	12/14/23	12/14/23
d 14385 SHARES OF BROAD	COM STOCK					D	12/15/23	12/15/23
e 1800 SHARES OF BROADC	OM STOCK					D	12/18/23	12/18/23
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost plus ex	or othe pense o			·	(h) Gain or (loss) ((e) plus (f) minus (
a 2,881,153.				9,23	2.			2,871,921.
b 15,951,158.				38,87	9.			15,912,279.
c 16,132,973.				38,16				16,094,813.
d 16,209,034.				37,73	0.			16,171,304.
e 2,059,935.				4,72	1.			2,055,214.
	ng gain in column (h) and owned by t	the foundation of	on 12/31	,		(I)	Gains (Col. (h) gain	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Exc	ess of c col. (j), if	ol. (i)			(k), but not less that Losses (from col. (1 -0-) or
a								2,871,921.
b								15,912,279.
С								16,094,813.
d								16,171,304.
e								2,055,214.
Part I, line 8	ss) as defined in sections 1222(5) an column (c). See instructions. If (loss	- in Part I, line 7 Id (6): s), enter -0- in	7		$\left.\right\} \frac{2}{3}$		N/A	53,105,531.
	sed on Investment Incom	·	4940	(a), 494	0(b), o	<u>r 4948 - s</u>	see instructio	ns)
1a Exempt operating foundations	described in section 4940(d)(2), cheo	ck here 🔜 🗌	and	enter "N/A	A" on line	1.		
-	letter: (at			-		uctions)		739,988.
	enter 1.39% (0.0139) of line 27b. Ex		-					
4% (0.04) of Part I, line 12, col	.(b)					J		
2 Tax under section 511 (domes	tic section 4947(a)(1) trusts and taxa	ble foundations	only; ot	thers, ente	r -0-)			0.
							3	739,988.
4 Subtitle A (income) tax (domes	stic section 4947(a)(1) trusts and tax	able foundation	s only; o	others, ente	er -0-)		4	0.
5 Tax based on investment inco	me. Subtract line 4 from line 3. If ze	ro or less, enter	· -0				5	739,988.
6 Credits/Payments:								
	and 2022 overpayment credited to 20		6a			25,152		
	tax withheld at source		6b			0		
c Tax paid with application for ex	$(tension of time to file (Form 8868)_{\dots})$		6c			740,000		
d Backup withholding erroneous	ly withheld		6d			0	<u>.</u>	
	7 Total credits and payments. Add lines 6a through 6d					7	765,152.	
8 Enter any penalty for underpay	rment of estimated tax. Check here 🛛	if Form 2	220 is at	ttached _.			8	0.
	and 8 is more than line 7, enter amo						9	
10 Overpayment. If line 7 is more	than the total of lines 5 and 8, enter	the amount ov	erpaid				10	25,164.
11 Enter the amount of line 10 to	be: Credited to 2024 estimated tax			25	,164.	Refunded		0.
							F	orm 990-PF (2023)

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	າ 990-PF (20		3-0758237		Page 4
Pa	rt 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		Yes	No
	any politica	I campaign?	1a		X
b		d more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition			x
		er is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or			
		by the foundation in connection with the activities.			
~		ndation file Form 1120-POL for this year?	10		x
		nount (if any) of tax on political expenditures (section 4955) imposed during the year:			
u					
	. ,				
e		imbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			
	managers.	\$0.			v
2		ndation engaged in any activities that have not previously been reported to the IRS?	2		X
		ach a detailed description of the activities.			
3		ndation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or			
		other similar instruments? If "Yes," attach a conformed copy of the changes			X
4a	Did the four	ndation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b	lf "Yes," has	s it filed a tax return on Form 990-T for this year?	N/A 4b		
		a liquidation, termination, dissolution, or substantial contraction during the year?			X
		ach the statement required by General Instruction T.			
6		uirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
	-	age in the governing instrument, or			
		egislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law			
	-	re governing instrument?	6	х	
7		ndation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV		х	<u> </u>
'			·····		
0.	Entar the ot	ates to which the foundation reports or with which it is registered. One instructions			
ōa	CA	ates to which the foundation reports or with which it is registered. See instructions.			
D		er is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)			
		te as required by General Instruction G? If "No," attach explanation		X	
9		dation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar			
		or the tax year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII			X
10	Did any per	SONS become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X
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	11		X
12		ndation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privile			
	If "Yes," atta	ach statement. See instructions	12		x
13		ndation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
		dressWWW.SAMUELI.ORG			
14		are in care of MICHAEL SCHULMAN Telephone no. 94	49-760-4300		
			ZIP+4 92625		
15					
10		47(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here		/A	
40		ne amount of tax-exempt interest received or accrued during the year1		Yes	No
16		during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank,		res	
	-	or other financial account in a foreign country?			X
	See the inst	tructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
	foreign cou	ntry			
			Form 99	U-PF	(2023)

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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. Image: Note that the second and the second applies and the second applies. Image: Note that the second applies and the second applies and the second applies. Image: Note that the second applies and the second applice applies and the second applies and the s	Form 99)-PF (2023) SAMUELI FOUNDATION	33-0758237		Page 5
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? (1) X (2) Borrow money from, lend momey to, or otherwise extend credit to (or accept it from) a disqualified person? (1a(1)) X (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (1a(2)) X (4) Pay compensation to, or pay or reinburst the expenses of, a disqualified person? (1a(3)) X (5) Transfer any income or assets to a disqualified person? (1a(3)) X (6) Agree to pay money trongeny 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)) X 1 I any answer is "Yes" to fa(1)-(6), did any of the tacts fail to qualify under the exceptions described in Regulations section 53.4941(0)-3 or in a current notice regarding disaster assistance, check here (1b) X 1 Did the foundation engage in a prior year in any of the acts all to qualify under the excepted acts, that were not corrected before the first day of the tax year beginning in 2023? 1d X 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation dischapter assistance;	Part	VI-B Statements Regarding Activities for Which Form 4720 May Be Required		_	
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? 1a(1) X (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) iaiguified person? ia(2) X (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ia(3) X (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ia(3) X (5) Transfer any income or assets to a disqualified person? ia(4) X (6) Agree to pay money or property to a government official? (Exception. Check 'No' it to to nomek op and to or to enely but ethe difiel for a period after ia(5) X termination of government service, if terminating within 90 days.) b I any answer is 'Yes' to 1a(1)-(6), did any of the acts lati to qualify under the exceptions described in Regulations ia(6) X c Organizations relying on a current notice regarding disaster assistance? Sec instructions ib X 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(n)(3) or 4942(n)(5): id X a At the end of tax year S203, did the foundation have any undistributed income? (II applying section 4942(a)(2) celtaing to incorrect valuation of section 4942(a)(2) are being applied to any of the years listed in 2a, inster previsions of section 4942(a)(2) (reliting to	Fi	e Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
(1) Engrade model of an oney from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 1a(3) X (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? 1a(3) X (4) Pay compensation to, or pay or reinhurse the expenses of, a disqualified person? 1a(4) X (5) Transfer any income or assets to a disqualified person? 1a(4) X (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, it terminating within 90 days.) 1a(6) X b If any answer is 'Nes' to fa(1)(-6), did any of the acts dial to qualify under the exceptions described in Regulations section 53.4941(0)-3 or in a current notice regarding disaster assistance? See instructions 1a(6) X 10 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 2023? 1d X 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(i)(3) or 4942(i)(5)); 1d X 2 Taxes on failure to distributed income? (If applying section 4942(a)(2) celating to incorrect valuation of assets) to the years' aun	1a Di	ring the year, did the foundation (either directly or indirectly):			
a disqualified person? ia(2) X (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ia(3) X (4) Pay compensation to, or pay or reimburse the expenses of a disqualified person? ia(4) X (5) Transfer any income or assets to a disqualified person? ia(4) X (6) Agree to pay money or property to a government official? (Exception. Check Nto" 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.) ia(6) X 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(0)-3 or in a current notice regarding disaster assistance? See instructions ib X c Organizations relying on a current notice regarding disaster assistance? See instructions ib X d Did the foundation engage in a prior year in any of the acts fail to qualify under the excepted acts, that were not corrected before the first day of the axy gar beginning in 2023? id X 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(i)(5) or 4942(i)(5): id X a At the end of tax year 2023, id if applying section 4942(a)(2) relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) (relating to	(1	Engage in the sale or exchange, or leasing of property with a disqualified person?)	X
(a) Furnish qoods, services, or facilities to (or accept them from) a disqualified person? 1a(3) X (d) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 1a(4) X (e) 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) X (f) 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(6) X (e) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to empty the official for a period after termination within 90 days.) 1a(6) X b If any answer is 'Yes' to 1a(1)-(6), idi 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 1a(6) X c Organizations relying on a current notice regarding disaster assistance? See instructions 1b X 2 Taxes on failure to distribute income (section 4942) (J(3) or 4942(J)(5)): 1d X a At the end of tax year (S) beginning before 2023?	(2	Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
(a) Furnish qoods, services, or facilities to (or accept them from) a disqualified person? 1a(3) X (d) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 1a(4) X (e) 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) X (f) 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(6) X (e) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to empty the official for a period after termination within 90 days.) 1a(6) X b If any answer is 'Yes' to 1a(1)-(6), idi 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 1a(6) X c Organizations relying on a current notice regarding disaster assistance? See instructions 1b X 2 Taxes on failure to distribute income (section 4942) (J(3) or 4942(J)(5)): 1d X a At the end of tax year (S) beginning before 2023?		a disqualified person?	1a(2)	X
 (a) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (b) Agree to pay money or property to a government official? (Exception. Check No⁺ if the foundation area to make any of either available 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 repage 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 2023? 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(i)(3) or 4942(i)(5)): a At the end of tax year 2023, did 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) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) (relating to incorrect valuation of assets) to the year's andistributed income? (If applying section 4942(a)(2) (relating to incorrect waluation fib year? b) If "Yes," did it have excess business holdings in 2023 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 4942(a)(2)/(T) 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 Form 4720, Schedule C, to determine if the foundation invest during	(3	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	X
for the benefit or use of a disqualified person)? 1a(5) X (6) Agree to pay money or property to a government official? (Exception. Check No" 1a(6) X (7) Agree to pay money or property to a government official? (Exception. Check No" 1a(6) X (8) Agree to pay money or property to a government service, if terminating within 90 days.) 1a(6) X (9) 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(0)-3 or in a current notice regarding disaster assistance? See instructions 1b X (10) 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 2023? 1d X (2) Taxes on failure to distribute income (section 4942) (dees not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5): 2a X (8) Ar the end of tax year 2023, did the foundation have any undistributed income? (If applying section 4942(a)(2) treating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) treating to incorrect waluation or dassets business holdings in 2023 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; 21 the layse of the 5-year period (or longer period approved by the Commissioner under section 4942(a)(C)(T) to dispose of holdings ac	(4	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?		X	
(6) Agree to pay money or property to a government official? (Exception. Check 'No" Image: Check 'No" if the foundation agreed to make a grant to or to employ the official for a period after Image: Check 'No" termination of government service, if terminating within 90 days.) Image: Check 'No" b If any answer is 'Yes' to 1a(1)-(6), (di any of the acts fail to qualify under the exceptions described in Regulations Image: Check here c Organizations relying on a current notice regarding disaster assistance? See instructions Image: Check here d Did the foundation aggee 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 2023? Image: Check here 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(i)(3) or 4942(i)(5)): Image: Check here a At the end of tax year 2023, dd the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the foundation in sont 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.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Image: Ameter any amount in a 2% direct or indirect interest in any business enterprise at any time during the year? Image: Amet	(5	Transfer any income or assets to a disqualified person (or make any of either available			
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a At the end of tax year 2023, did the foundation have any undistributed income (Part XII, lines 2a X if "Yes," list the years	2 Ta	kes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			
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If "Yes," list the years ,,,,,,,	a At	the end of tax year 2023, did the foundation have any undistributed income (Part XII, lines			
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during the year? 3a X b If "Yes," did it have excess business holdings in 2023 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2023.) N/A 3b 4a X 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X 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 2023? 4b X	c If i	he provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
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of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, 3b Schedule C, to determine if the foundation had excess business holdings in 2023.) N/A 3b 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X 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 2023? 4b X					
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b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that Image: Comparison of the second seco					\vdash
had not been removed from jeopardy before the first day of the tax year beginning in 2023? 4b X	4a Di	I the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	b Di	I the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose th	at		
	ha	1 not been removed from jeopardy before the first day of the tax year beginning in 2023?			

Form **990-PF** (2023)

323541 12-20-23

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Form 990-PF (2023) SAMUELI FOUNDATION			33-0758237		I	⁵ age 6
Part VI-B Statements Regarding Activities for Which Fo	orm 4720 May Be Re	equired (contin	ued)			
5a During the year, did the foundation pay or incur any amount to:					Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	4945(e))?			5a(1)		Х
(2) Influence the outcome of any specific public election (see section 4955); or	to carry on, directly or indire	ctly,				
any voter registration drive?				5a(2)		X
(3) Provide a grant to an individual for travel, study, or other similar purposes?				5a(3)		X
(4) Provide a grant to an organization other than a charitable, etc., organization	described in section					
4945(d)(4)(A)? See instructions				5a(4)		X
(5) Provide for any purpose other than religious, charitable, scientific, literary, c	or educational purposes, or fo	r				
the prevention of cruelty to children or animals?				5a(5)		X
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under						
section 53.4945 or in a current notice regarding disaster assistance? See instruc	ctions		N/A	5b		
c Organizations relying on a current notice regarding disaster assistance, check he	ere					
${f d}$ If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the foundation exemption from the foundation claim exemption from the foundation exemption exemption from the foundation exemption	om the tax because it maintair	ned				
expenditure responsibility for the grant?			N/A	5d		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).						
6a Did the foundation, during the year, receive any funds, directly or indirectly, to particularly the foundation of the second	ay premiums on					
a personal benefit contract?			·····	6a		Х
${f b}$ Did the foundation, during the year, pay premiums, directly or indirectly, on a pe	rsonal benefit contract?			6b		X
If "Yes" to 6b, file Form 8870.						
7a At any time during the tax year, was the foundation a party to a prohibited tax sh	elter transaction?			7a		Х
b If "Yes," did the foundation receive any proceeds or have any net income attribute	able to the transaction?		N/A	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1	,000,000 in remuneration or					
excess parachute payment(s) during the year?				8		Х
Part VII Information About Officers, Directors, Truster	es, Foundation Man	agers, Highly				
Paid Employees, and Contractors						
1 List all officers, directors, trustees, and foundation managers and the	•	(a) Companyation				
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans and deferred		e) Exp count.	ense other
	to position	enter -0-)	compensation		allowai	

SEE STATEMENT 10	940,874.	55,831.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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
MICHELLE FREEMAN - 2101 E. COAST	CHIEF OF STAFF			
HIGHWAY, SUITE 300, CORONA DEL MAR,	40.00	273,804.	41,873.	0.
JOAN WALTER - 2101 E. COAST HIGHWAY,	SENIOR DIRECTOR, PRO	GRAM OPERATIC	NS	
SUITE 300, CORONA DEL MAR, CA 92625	40.00	234,148.	4,626.	0.
WENDY ACIERO - 2101 E. COAST	EXECUTIVE DIRECTOR,	ANAHEIM DUCKS		
HIGHWAY, SUITE 300, CORONA DEL MAR,	40.00	147,417.	44,831.	0.
VICTORIA TORRES - 2101 E. COAST	PROGRAM DIRECTOR			
HIGHWAY, SUITE 300, CORONA DEL MAR,	40.00	111,997.	19,560.	0.
WAYAN KAUFMAN - 2101 E. COAST	GRANTS ADMINISTRATO	R		
HIGHWAY, SUITE 300, CORONA DEL MAR,	40.00	89,729.	6,280.	0.
Total number of other employees paid over \$50,000	-			8

Form **990-PF** (2023)

323551 12-20-23

Form 990-PF (2023) SAMUELI FOUNDATION	33	3–0758237 Page 7
Part VII Information About Officers, Directors, Trustees, Foundati Paid Employees, and Contractors (continued)	on Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter "	NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
MOSES MIRACLES LTD.		
30 MEKCHRT STREET, TEL AVIV, ISRAEL 6523417	CONSULTING	299,400.
ANTHONY SABA		
105 E. EDGEWATER, NEWPORT BEACH, CA 92661	CONSULTING	120,000.
SU HALE	-	
35 DOUGLAS RD, ROCHESTER, NY 14610	CONSULTING	115,000.
	-	
	-	
		0
Total number of others receiving over \$50,000 for professional services		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic		Expenses
number of organizations and other beneficiaries served, conferences convened, research papers produc	ced, etc.	
1N/A		_
		_
2		_
		_
3		
4		
Part VIII-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on lin	nes 1 and 2.	Amount
1 N/A		
		7
2		
		7
		7
All other program-related investments. See instructions.		
3		
·		
		\dashv
		-
Tatal Add lines 1 through 2		0.
Total. Add lines 1 through 3	<u></u>	Form 990-PF (2023)
		Form 330-FF (2023)

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Ρ	Part IX Minimum Investment Return (All domestic foundations must complete this part. Foreign for	undations, s	ee 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	0.
b		1b	17,739,048.
C	Fair market value of all other assets (see instructions)	1c	65,662.
d	Total (add lines 1a, b, and c)	1d	17,804,710.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	Ο.
3	Subtract line 2 from line 1d	3	17,804,710.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	267,071.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	17,537,639.
6	Minimum investment return. Enter 5% (0.05) of line 5	6	876,882.
Ρ	Part X Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations a	and certain	
_	foreign organizations, check here and do not complete this part.)		076 000
1	Minimum investment return from Part IX, line 6	1	876,882.
	Tax on investment income for 2023 from Part V, line 5 2a 739,988.		
b		0.	720 000
C		2c	739,988.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	136,894.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	136,894.
6	Deduction from distributable amount (see instructions)	6	136,894.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	136,894.
Ρ	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	37,304,144.
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		3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4	4	37,304,144.

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Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X,	Corpus		2022	2023
line 7				136,894.
2 Undistributed income, if any, as of the end of 2023:				,
a Enter amount for 2022 only			0.	
b Total for prior years:				
,,		0.		
3 Excess distributions carryover, if any, to 2023:				
a From 2018 1,826,147.				
b From 2019 1,239,246.				
c From 2020 7,480,206.				
d From 2021 11,469,726.				
e From 2022 23,795,756.				
f Total of lines 3a through e	45,811,081.			
4 Qualifying distributions for 2023 from				
Part XI, line 4: \$ 37,304,144.				
a Applied to 2022, but not more than line 2a			Ο.	
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 2023 distributable amount				136,894.
e Remaining amount distributed out of corpus	37,167,250.			
5 Excess distributions carryover applied to 2023 (If an amount appears in column (d), the same amount	0.			0.
must be shown in column (a).)				-
indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	82,978,331.			
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 2022. Subtract line		- -		
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2023. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2024				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)	0.			
8 Excess distributions carryover from 2018				
not applied on line 5 or line 7	1,826,147.			
9 Excess distributions carryover to 2024.				
Subtract lines 7 and 8 from line 6a	81,152,184.			
10 Analysis of line 9:	, , , , , , , , , , , , , , , , , , , ,			
a Excess from 2019 1,239,246.				
b Excess from 2020 7,480,206.				
c Excess from 2021 11,469,726.				
d Excess from 2022 23,795,756.				
e Excess from 2022 37,167,250.				
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2023.05000 SAMUELI FOUNDATION

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Part XIII Private Operating Fou	Indations (see ins	structions and Part VI-	A, question 9)		N/A		
1 a If the foundation has received a ruling or d	etermination letter that	it is a private operating					
foundation, and the ruling is effective for 2	023, enter the date of t	he ruling					
b Check box to indicate whether the foundati				🔄 4	4942(j)(3) or	49)42(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 year	rs			
income from Part I or the minimum	(a) 2023	(b) 2022	(c) 2021		(d) 2020)	(e) Total
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							
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 XIV Supplementary Inform			f the founda	tion h	ad \$5,000 o	or mor	e in assets
at any time during the	e year-see instru	uctions.)					
1 Information Regarding Foundation I	-						
a List any managers of the foundation who h			ibutions received	by the fo	oundation before	the clos	e of any tax
year (but only if they have contributed mor	e than \$5,000). (See se	ection 507(0)(2).)					
CEE CTATEMENT 11							

SEE STATEMENT II

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.

NONE

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.

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

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

c Any submission deadlines:

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

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Part XIV Supplementary Information				
3 Grants and Contributions Paid During the Y Recipient	ear or Approved for Future I If recipient is an individual,	Payment		
Name and address (home or business)	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				
ABOUND FOOD CARE	NONE	PC	MEDICAL/HEALTH	
200 NORTH TUSTIN AVE, SUITE 110 SANTA ANA, CA 92705				1,050,000
				, ,
AIEF (AMER. ISRAEL EDU. FOUNDATION)	NONE	PC	RELIGIOUS	
251 H STREET, NW	NONE	10	KEIIGIOOD	
VASHINGTON, DC 20001				25,000
ALIANZA TRANSLATINX 206 W. FOURTH STREET, SUITE 420	NONE	PC	SOCIAL SERVICES	
SANTA ANA, CA 92701				250,000
ALLIANCE FOR A JUST SOCIETY 3518 S. EDMUNDS STREET	NONE	PC	ENVIRONMENT	
SEATTLE, WA 98118				100,000
AMALGAMATED FOUNDATION	NONE	PC	SOCIAL SERVICES	
1825 K STREET NW WASHINGTON, DC 20006				100,000
· · · · · · · · · · · · · · · · · · ·	UATION SHEET(S)		3a	34,546,542
b Approved for future payment				
NONE				
Total			3b	0

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Part XV-A Analysis of Income-Producing Activities

	Unrelated	l business income	Exclu	ded by section 512, 513, or 514	(-)
Enter gross amounts unless otherwise indicated.	(a) Business	(b) Amount	(C) Exclu- sion code	(d) Amount	(e) Related or exempt function income
1 Program service revenue:	code		code	, inount	
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			14	719,492.	
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other			1.0	22.100	
than inventory			18	33,160.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a b					
c d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		752,652.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	752,652.
(See worksheet in line 13 instructions to verify calculations.)					
Part XV-B Relationship of Activities to	the Accor	nolishment of Exe	emot	Purposes	
Line No. Explain below how each activity for which incom			contrib	uted importantly to the accomp	olishment of
the foundation's exempt purposes (other than by	y providing fund	ds for such purposes).			

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Part XVIII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organization 1 Inter dragmation directly enginetizes on a well and the following with any other organization described in section 501(s) (minitable scenario 2014) (minitable scenar	Form 990)-PF (2	023) SAMUELI	FOUNDATION				33-07582	37	Pa	ige 13
1 Det la organization directly on indirectly engine in any of the following will any of ther organization discribed in section 501(c) 1 transities from the experting bundation is a noncharitable exempt organization of (1) Casis (2) Other issats (3) Chern and the exempt organization (2) Purchases to a noncharitable exempt organization (3) Rent and of failes, equipment, managements (4) Rentbursement arrangements (5) Closes or the approximation to reader described (6) Partormance of services or manheship or fundacising solicitations (4) Rentbursement arrangements (5) Closes or the partormal bundet. The following schedular, copied exempt organization (4) Item exercises (5) Closes or the partormal bandows in Yes, complete the following schedular, copied enginese (6) Partormance of services or manheship or fundacising solicitations (6) Lines or the partormation reader described. Column (6) Should always show the fair market value in any transaction, and enginese (6) Name of the partormation encode described. Exempt of spatial always show the fair market value in any caracity, during arrangements (6) Name of the partormation encode described. Exempt of spatial always show the fair market value in any transaction, and arrangements (6) Name of the partormation encode described. Exempt of spatial always show the fair market value in any transaction, and arrangements (6) Name of the partormation encode described. (6) Annount involved (6) Name of noncharitable exempt organization (4) Name of the organization (5) Name of the partormation (6) Name of noncharitable exempt organization (6) Description of relationship (7) Asset to asset, or an ender the transactions. and arrangements (6) Annount involved (6) Name of noncharitable exempt organization (6) Description of relationship (7) Asset to asset, and combine. Declaration of particle asset and extempt or antiparagement area transactions (6) Announ	Part 2	XVI			sfers to a	nd Transactions a	nd Relations	nips With Noncharit	able		
enter than section 50 1(c)(3) organizations) or in section 527, retaining to political organization of: 14 (1) x 11 Cash 14 (1) x 12 Control to the reporting foundation to a noncharitable exempt organization of: 14 (1) x 12 Control to the reporting foundation to a noncharitable exempt organization 14 (1) x 13 States of assists to a noncharitable exempt organization 15 (2) x 14 States of assists to a noncharitable exempt organization 15 (3) x 14 Other sasets 15 (3) x 15 States of assists to an anocharitable exempt organization 15 (3) x 16 Perturbance of services or membership or fundraising solicitators 16 (3) x 16 Perturbance of services or membership or fundraising solicitators 16 (3) x 12 Perturbance of services or membership or fundraising solicitators 16 (4) x 13 Other same of services or membership or fundraising solicitators 16 (4) x 16 (4) 14 If the answer to any garantees 16 (4) 16 (4) x 16 (4) 16 If the answer to any of										Vee	
Transfers from the reparting foundation to a noncharitable exempt organization of:							on described in sec	tion 501(c)		res	NO
(1) Cesh Ist() x (2) Other sets: Ist() x (1) State of assets to a nonharitable exempt organization Ist() x (2) Purchese of assets true a nonharitable exempt organization Ist() x (3) Rental of facilities, equipment, or other assets Ist() x (4) Rental of facilities, equipment, or other assets Ist() x (3) Rental of facilities, equipment, noning lists, other assets, or paid employees Ist() x (4) If the assets or any other above is three sets, or paid employees Ist() x (4) If the assets or any other above is other assets, or paid employees Ist() x (4) If the assets or envices given by the reporting foundation. If the foundation receive lies than fair market value in any transaction or sharing arrangement, show in norther walue of the goods, other assets, are read-walue in any transaction or sharing arrangement, show in norther walue of the goods, other assets, are read-walue in any transaction or sharing arrangement, show in norther walue of the goods, other assets, are read-walue in any transaction or sharing arrangement, show in norther walue of the goods, other assets, are read-walue in any transaction or sharing arrangement, show in norther walue in any transaction or sharing arrangement, show in norther walue in any transaction or sharing arrangement, show in norther walue in any transaction or sharing arrangement, show in norther walue in any transaction or sharing arrangement, show in a strensaction or sharing arr			()()	,							
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b Other transactions: (1) Sales of assets to a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Rental out facilities, equipment, or other assets (b) Lears or loan guarantees (c) Decoration of services or membership or fund-aising solicitations (a) Rental of facilities, equipment, mailing lists, other assets, or paid employees (b) Lears or loan guarantees (c) Performance of services or membership or fund-aising solicitations (c) Performance of services or membership or fund-aising schedule. Column (b) should always show the fair market value of the goods, other assets, or services face-wides than fair market value in any transaction or staring arrangements. Show in calumm (d) the value of the goods, other assets, or services face-wide. (c) Unreve (b) Amount involved (c) Name of oncharitable exempt organization (c) Describtion or transfers, and sharing arrangements. (c) Unreve (b) Amount involved (c) Name of oncharitable exempt organizations described (c) Internet of the pools of the (c) (c) on indirechty affiliated with, or related to, one or more tax-exempt organizations described (c) Internet of oncharitable the other schedule (c) (c) on indirechty affiliated with, or related to, one or more tax-exempt organization described (c) Internet of oncharitable the other schedule. (d) Barne of organization (e) Barne of organization (f) Type organization (f) Type organization (h) Type organization (h) Type organization (h) Type organization (h) Type organizatio											
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d If the answer to any of the above is "vsi," 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 (g) the value of the goods, other assets, or services received. (a) Live res (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements 3/A 3/A											х
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N/A N/A	col	umn (d) the value of the goods,	other assets, or servi	ices received.						
2a is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (duter than section 501(c)(3)) or in section 527? Yes Image: Complete the following schedule. 2a is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (duter than section 501(c)(3)) or in section 527? Yes Image: Complete the following schedule. (a) Name of organization (b) Type of organization (c) Description of relationship N/A Image: CPO & SECRETARY Image: CPO & SECRETARY Sign Preparer Print/Type preparer's name Preparer's signature Date CPO & SECRETARY Print/Type preparer's name Preparer's signature Date CPO & SECRETARY Image: CPO & SECRETARY Used Only Firm's name BAKER TILLY ADVISORY GROUP, LP Firm's EIN 39-0859910 Firm's address 11/12/24 Firm's EIN 39-0859910	(a) Line n	D.	(b) Amount involved	(c) Name of	f noncharitable	exempt organization	(d) Description	on of transfers, transactions, and s	haring arr	angemer	ıts
in section 501(c) (other than section 501(c)(3)) or in section 52?? b If "Yes," complete the following schedule. (a) Name of organization N/A VA VA VA VA VA VA VA VA VA V					N/A						
in section 501(c) (other than section 501(c)(3)) or in section 52?? b If "Yes," complete the following schedule. (a) Name of organization N/A VA VA VA VA VA VA VA VA VA V											
in section 501(c) (other than section 501(c)(3)) or in section 527?											
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in section 501(c) (other than section 501(c)(3)) or in section 52?? b If "Yes," complete the following schedule. (a) Name of organization N/A VA VA VA VA VA VA VA VA VA V											
b If "Yes," complete the following schedule. (a) Name of organization (b) Type of organization N/A (c) Description of relationship 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. Here CFO & SECRETARY Signature of officer or trustee Date Print/Type preparer's name Preparer's signature BRIAN YACKER BRIAN YACKER BRIAN YACKER BRIAN YACKER BRIAN YACKER BRIAN YACKER I'm''s name BAKER TILLY ADVISORY GROUP, LP	2a lst	he four	dation directly or indirec	tly affiliated with, or ı	related to, one	or more tax-exempt organ	zations described	_			_
Image: constraint of the second se	in s	ection	501(c) (other than sectio	n 501(c)(3)) or in se	ction 527?			L	Yes	X	No
N/A Main Sign 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. May the IRS discuss this return with the preparer shown below? See instr. Sign CFO & SECRETARY X Yes No Signature of officer or trustee Date Check if self- employed PTIN Preparer BRIAN YACKER BRIAN YACKER 11/12/24 P00401346 Preparer Firm's name BAKER TILLY ADVISORY GROUP, LP Firm's EIN 39-0859910 Firm's address 18500 VON KARMAN AVE, 10TH FLOOR Firm's EIN 39-0859910	b_lf"\	Yes," co				(b) Truck of any anti-ation		(a) Description of relations	h		
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. May the IRS discuss this return with the preparer shown below? See instr. Signature of officer or trustee Date CFO & SECRETARY X Yes No Paid Preparer Use Only Print/Type preparer's name Preparer's signature Date Check if self- employed PTIN Firm's name BAKER TILLY ADVISORY GROUP, LP Firm's EIN 39-0859910 Firm's address 18500 VON KARMAN AVE, 10TH FLOOR Firm's EIN 39-0859910				Janization		(b) Type of organization		(c) Description of relations	nip		
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Paid Preparer Use Only BRIAN YACKER BRIAN YACKER 11/12/24 P00401346 Firm's name BAKER TILLY ADVISORY GROUP, LP Firm's EIN 39-0859910 Firm's address 18500 VON KARMAN AVE, 10TH FLOOR Firm's EIN 39-0859910			Print/Type preparer's na	ime	Preparer's si	gnature	Date				
Preparer Firm's name BAKER TILLY ADVISORY GROUP, LP Firm's EIN 39-0859910 Firm's address 18500 VON KARMAN AVE, 10TH FLOOR Firm's EIN 39-0859910	Detel										
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Firm's address 18500 VON KARMAN AVE, 10TH FLOOR	-		Firm's name BAKER	TILLY ADVISOR	Y GROUP, I	5P.		Firm's EIN 39–085	9910		
		y	Firm's address 1850	O VON KARMAN A	VE 10ጥሀ	FLOOR					
					,			Phone no 949.222.	2999		

Form	990-PF	(2023)
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323622 12-20-23

3 Grants and Contributions Paid During the Y	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	Amount
AMERICAN ACADEMY OF ARTS & SCIENCES	NONE	PC	EDUCATION	
136 IRVING STREET				
CAMBRIDGE, MA 02138-1996				5,000
AMERICAN COMMITTEE FOR TEL AVI	NONE	PC	RELIGIOUS	
FOUNDATION				
1410 BROADWAY, SUITE 2201				1 000 000
NEW YORK, NY 10018				1,000,000
AMERICAN FRIENDS OF MAGEN DAVID ADOM	NONE	PC	RELIGIOUS	
20 WEST 36TH STREET,SUITE 1100 NEW YORK, NY 10018				200,000
1044, MI 10010				200,000
AMERICAN FRIENDS OF START UP NATION	NONE	PC	MEDICAL/HEALTH	
CENTRAL INC.				
40 W 57TH STREET 26TH FLOOR NEW YORK, NY 10019				150,000
,				
AMERICAN FRIENDS OF TEL AVIV	NONE	PC	RELIGIOUS	
UNIVERSITY 8 WEST 40TH STREET, 8TH FLOOR				
NEW YORK, NY 10018				333,000
AMERICAN FRIENDS OF THE ISRAEL	NONE	PC	ARTS	
PHILHARMONIC ORCHESTRA, INC. 122 EAST 42ND STREET, SUITE 4507				
NEW YORK, NY 10168				25,000
NURLAN FRENDA OF WELLARNELL			2200	
AMERICAN FRIENDS OF THE ISRAELI OPERA, INC.	NONE	PC	ARTS	
200 EAST 74TH, APT 15A				
NEW YORK, NY 10021				100,000
AMERICAN FRIENDS OF THE RE'UT	NONE	PC	RELIGIOUS	
INSTITUTE				
21550 OXNARD ST, SUITE 1000				
WOODLAND HILLS, CA 91367				150,000
AMERICAN INSTITUTE OF HOMEOPATHY	NONE	PC	MEDICAL/HEALTH	
FOUNDATION				
10418 WHITEHEAD STREET				
FAIRFAX, VA 22030				1,000
ANAHEIM COMMUNITY FOUNDATION	NONE	PC	SOCIAL SERVICES	
200 S. ANAHEIM BLVD., #433				221 000
ANAHEIM, CA 92805 Total from continuation sheets				221,000 33,021,542

3 Grants and Contributions Paid During the	Year (Continuation)	1	- 1	
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	Anount
ANAHEIM DUCKS FOUNDATION	NONE	PC	SOCIAL SERVICES	
2695 E. KATELLA AVE				
ANAHEIM, CA 92806				750,00
ANAHEIM UNION HIGH SCHOOL DISTRICT	NONE	PC	MEDICAL/HEALTH	
501 NORTH CRESENT WAY ANAHEIM, CA 92801				170,000
ARTS & LEARNING CORPORATION	NONE	PC	ARTS	
151 KALMUS DR. SUITE G-3				
COSTA MESA, CA 92626				27,500
AUTOIMMUNE ASSOCIATION	NONE	PC	MEDICAL/HEALTH	
19176 HALL ROAD, SUITE 130	NONE	rc l	MEDICAL/ MEALIN	
CLINTON TOWNSHIP, MI 48038				17,000
BIG BROTHERS/BIG SISTERS OF OC &	NONE	PC	SOCIAL SERVICES	
INLAND EMPIRE				
1801 E. EDINGER AVE #101				
SANTA ANA, CA 92705				2,500
BOARD OF JEWISH EDUCATION	NONE	PC	RELIGIOUS	
520 8TH. AVE, 15TH FLOOR				
NEW YORK, NY 10018				500,000
BOREALIS PHILANTHROPY P.O. BOX 581218	NONE	PC	SOCIAL SERVICES	
MINNEAPOLIS, MN 55458				100,000
BOYS & GIRLS CLUBS OF GARDEN GROVE	NONE	PC	EDUCATION	
INC				
10540 CHAPMAN AVE				150 000
GARDEN GROVE, CA 92840				150,000
CAL STATE FULLERTON PHILANTHROPIC FOUNDATION	NONE	PC	EDUCATION	
2600 NUTWOOD AVE. SUITE 850				
FULLERTON, CA 92831				100,000
CALIFORNIA ASSOCIATION OF NONPROFITS 870 MARKET STREET, SUITE 609	NONE	PC	SOCIAL SERVICES	
SAN FRANCISCO, CA 94102				2,50
Total from continuation sheets				

3 Grants and Contributions Paid During the Y	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	Contribution	
CANCER KINSHIP	NONE	PC	MEDICAL/HEALTH	
307 PLACENTIA AVE, SUITE 203				
NEWPORT BEACH, CA 92663				25,00
CANOPY PLANET FOUNDATION	NONE	PC	ENVIRONMENT	
141-1733H STREET				
BLAINE, WA 98230				1,000,00
CEO LEADERSHIP ALLIANCE OF ORANGE	NONE	PC	EDUCATION	
COUNTY				
668 N. COAST HIGHWAY #319				
LAGUNA BEACH, CA 92651				250,00
CHAPMAN UNIVERSITY	NONE	PC	RELIGIOUS	
333 N. GLASSELL ST. ORANGE, CA 92866				50,00
CHARITABLE VENTURES OF ORANGE COUNTY	NONE	PC	SOCIAL SERVICES	
1505 E. 17TH STREET, SUITE 101				
SANTA ANA, CA 92705				170,50
CHILDREN NOW	NONE	PC	EDUCATION	
1404 FRANKLIN STREET, SUITE 700				==
OAKLAND, CA 94612				75,00
CHILDREN'S BUREAU	NONE	PC	SOCIAL SERVICES	
1910 MAGNOLIA AVENUE				
LOS ANGELES, CA 90007				50,00
CHOC FOUNDATION	NONE	PC	MEDICAL/HEALTH	
1201 W LA VETA				
DRANGE, CA 92868				22,06
CIELO COMMUNITY FOR INNOVATION	NONE	PC	SOCIAL SERVICES	
ENTREPRENEURSHIP LEADERSHIP OPPOR				
16787 BEACH BLVD., SUITE 233				
HUNTINGTON BEACH, CA 92647				55,00
COMMUNITY ACTION PARTNERSHIP OF	NONE	PC	SOCIAL SERVICES	
ORANGE COUNTY 11870 MONARCH STREET				
GARDEN GROVE, CA 92841				270,00
Total from continuation sheets	1			

3 Grants and Contributions Paid During the Y		T		ļ
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
COOPERACION SANTA ANA	NONE	PC	ENVIRONMENT	
1505 E. 17TH STREET SUITE 117				
SANTA ANA, CA 92705				100,00
CROSSOVER OUTREACH	NONE	PC	SOCIAL SERVICES	
414 W. COURT STREET				10.00
FLINT, MI 48503				10,00
DAYLE MCINTOSH CENTER FOR THE	NONE	PC	MEDICAL/HEALTH	
DISABLED				
501 N. BROOKHURST ST., STE 102				
ANAHEIM, CA 92801				5,00
DESERT COMMUNITY FOUNDATION	NONE	PC	EDUCATION	
75-105 MERLE DRIVE, SUITE 300				20.00
PALM DESERT, CA 92211				20,00
DESERT FOOTHILLS LIBRARY ASSOCIATION	NONE	PC	EDUCATION	
38443 N. SCHOOLHOUSE RD CAVE CREEK, AZ 85331				10 00
				10,00
		20		
DISCOVERY CUBE ORANGE COUNTY 2500 NORTH MAIN STREET	NONE	PC	EDUCATION	
SANTA ANA, CA 92705				426,16
				/
DWELLING PLACE ANAHEIM	NONE	PC	MEDICAL/HEALTH	
5340 E. LA PALMA AVE.	NONE	10	MEDICAL/MERLIN	
ANAHEIM, CA 92807				400,00
ENTERTAINMENT INDUSTRY FOUNDATION	NONE	PC	SOCIAL SERVICES	
PO BOX 845346				
LOS ANGELES, CA 90084				5,00
EZRAT ISRAEL, INC	NONE	PC	SOCIAL SERVICES	
806 EASTERN PARKWAY BROOKLYN NY 11213				325 00
BROOKLYN, NY 11213				325,00
FAIRFAX HIGH SCHOOL ALUMNI	NONE	PC	EDUCATION	
ASSOCIATION				
2221 WEST 26TH PLACE LOS ANGELES, CA 90018				25,00
Total from continuation sheets		1		23,00

Part XIV Supplementary Information			33-075	0237
3 Grants and Contributions Paid During the Ye				
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
FRACTURED ATLAS 228 PARK AVENUE SOUTH #56651 NEW YORK, NY 10003	NONE	PC	SOCIAL SERVICES	75,00
FRIENDS OF CATS INC. 15587 OLDE HIGHWAY 80 EL CAJON, CA 92021	NONE	PC	ENVIRONMENT	10,00
FRIENDS OF IR DAVID 99 WALL STREET, SUITE 5727 NEW YORK, NY 10005	NONE	PC	RELIGIOUS	1,025,00
FRIENDS OF THE JEWISH CHAPEL INC 326 FIRST ST STE 22 ANNAPOLIS, MD 21403	NONE	PC	RELIGIOUS	2,50
FRIENDS OF UNITED HATZALAH 442 5TH AVE, SUITE 1866 NEW YORK, NY 10018	NONE	PC	RELIGIOUS	200,00
FUENTE LATINA 7300 BISCAYNE BLVD, SUITE 200 MIAMI, FL 33138	NONE	PC	RELIGIOUS	300,000
FULLERTON COLLABORATIVE P.O. BOX 1088 FULLERTON, CA 92836	NONE	PC	SOCIAL SERVICES	5,00
FULLERTON HISTORIC THEATER FOUNDATION P.O. BOX 6753 FULLERTON, CA 92832	NONE	PC	ARTS	10,00
FUND FOR GUARANTEED INCOME 2040 E. MARIPOSA AVE EL SEGUNDO, CA 90245	NONE	PC	SOCIAL SERVICES	100,000
FUNGI FOUNDATION 716 MARCY AVENUE BROOKLYN, NY 11216 Total from continuation sheets	NONE	PC	ENVIRONMENT	50,00

3 Grants and Contributions Paid During the Yo		Г		
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
GEM STARFISH FOUNDATION	NONE	PC	EDUCATION	
14425 NORTH 22ND STREET				
PHOENIX, AZ 85022				50,00
GLOBAL IMPACT	NONE	PC	MEDICAL/HEALTH	
1199 N. FAIRFAX ST, SUITE 300				4 000 00
ALEXANDRIA, VA 22314				4,800,00
HARBOR VIEW PARENT FACULTY	NONE	PC	EDUCATION	
ORGANIZATION				
900 GOLDENROD AVENUE				
CORONA DEL MAR, CA 92625				1,00
HAWAII COMMUNITY FOUNDATION	NONE	PC	SOCIAL SERVICES	
827 FORT STREET MALL				
HONOLULU, HI 96813				200,00
HERSTORY INC	NONE	PC	MEDICAL/HEALTH	
1781 CAMPTON AVE, SUITE 214 ANAHEIM, CA 92805				25,00
				23,00
UTCU COUCCI INC. ACADEMIEC ECHNDARION	NONE	PC	PDUCARTON	
HIGH SCHOOL INC. ACADEMIES FOUNDATION 2995 AIRWAY AVENUE, SUITE B	NONE	PC	EDUCATION	
COSTA MESA, CA 92626				75,00
· · ·				
HILLEL FOUNDATION OF ORANGE COUNTY	NONE	PC	RELIGIOUS	
1 FEDERATION WAY, SUITE 205				
IRVINE, CA 92603				105,50
HONORHEALTH FOUNDATION	NONE	PC	MEDICAL/HEALTH	
ATTN: HONORHEALTH FOUNDATION GIFT				
PROCESSING, 8125 N. HAYDEN RD				
SCOTTSDALE, AZ 85258				10,00
I-5 FREEDOM NETWORK	NONE	PC	SOCIAL SERVICES	
160 AVENIDA GRANADA				
SAN CLEMENTE, CA 92672				15,00
IEEE FOUNDATION 445 HOES LANE	NONE	PC	EDUCATION	
PISCATAWAY, NJ 08854				200,00
Total from continuation sheets		1	•	, · · ·

3 Grants and Contributions Paid During the Ye		1		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	
INNOVATIVE HOUSING OPPORTUNITIES	NONE	PC	SOCIAL SERVICES	
501 N. GOLDEN CIRCLE DR., SUITE 100				
SANTA ANA, CA 92705				46,00
INCHIMINE EOD NAMIDAL MEDICINE	NONE	PC	MEDICAL (HEALMH	
INSTITUTE FOR NATURAL MEDICINE 4500 9TH AVENUE NE, SUITE 300	NONE	rc	MEDICAL/HEALTH	
SEATTLE, WA 98105				25,00
INTERNATIONAL SANCTUARY	NONE	PC	SOCIAL SERVICES	
17935 SKY PARK CIRCLE SUITE F				
IRVINE, CA 92614				15,000
ISRAAID (US) GLOBAL HUMANITARIAN	NONE	PC	RELIGIOUS	
ASSISTANCE INC				
PO BX 61227 PALO ALTO, CA 94306				100,000
ISRAEL LACROSSE ASSOCIATION	NONE	PC	SOCIAL SERVICES	
P.O. BOX 513				
FOXBOROUGH, MA 02035				2,50
J.F. SHEA THERAPEUTIC RIDING CENTER 26284 OSO ROAD	NONE	PC	SOCIAL SERVICES	
SAN JUAN CAPISTRANO, CA 92675				20,000
JAPANESE AMERICAN NATIONAL MUSEUM	NONE	PC	ARTS	
100 N. CENTRAL AVE.				
LOS ANGELES, CA 90012				8,00
JAPANESE FRIENDSHIP GARDEN OF PHOENIX 216 W. PORTLAND STREET	NONE	PC	ENVIRONMENT	
PHOENIX, AZ 85003				10,00
JEWISH COMMUNITY CENTER OF OC	NONE	PC	RELIGIOUS	
1 FEDERATION WAY, SUITE 200				20.00
IRVINE, CA 92603				30,00
JEWISH COMMUNITY CENTERS ASSOCIATION	NONE	PC	RELIGIOUS	
OF NORTH AMERICA				
520 8TH AVENUE				250 000
NEW YORK, NY 10018 Total from continuation sheets				250,00

NDATION		33-075	0237
If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	Amount
or substantial contributor	recipient		, initiality
NONE	PC	RELIGIOUS	
			700,000
			,
NONE	PC	RELIGIOUS	
			101,000
NONE	PC		
		KELIGIOUS	15 000
			15,000
NONE	PC	MEDICAL/HEALTH	
			186,000
NONE	PC	SOCIAL SERVICES	2 500
			2,500
NONE	PC	RELIGIOUS	
			50,000
NONE	PC	MEDICAL/HEALTH	
			500,000
NONE	PC	EDUCATION	
			1,000
NONE	PC	SOCIAL SERVICES	
			5,000
NONE	PC	SOCIAL SERVICES	
			1,000
	ear (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor NONE NONE	Prear (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor NONE PC NONE PC	Precipient is an individual, show any relationship to or substantial contributor Foundation status of recipient Purpose of grant or contribution NONE PC RELIGIOUS NONE PC RELIGIOUS

3 Grants and Contributions Paid During the		1		
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
JIBERTAS COUNCIL	NONE	PC	SOCIAL SERVICES	
L002 PRUITT COURT S.W.				
VIENNA, VA 21180				2,50
LIVING SUCCESS CENTER	NONE	PC	MEDICAL/HEALTH	
PO BOX 11346				2.00
COSTA MESA, CA 92627				3,00
AKE-A-WISH FOUNDATION OF ORANGE	NONE	PC	SOCIAL SERVICES	
COUNTY & THE INLAND EMPIRE INC				
3230 EL CAMINO REAL SUITE 100				
IRVINE, CA 92602				3,00
MAMMOTH LAKES RECREATION	NONE	PC	SOCIAL SERVICES	
PO BOX 8562 MAMMOTH LAKES CA 93546				1 00
MAMMOTH LAKES, CA 93546				1,00
MAUI AIDS FOUNDATION	NONE	PC	SOCIAL SERVICES	
	NONE	PC	SOCIAL SERVICES	
1935 MAIN STREET, SUITE 101 WAILUKU, HI 96793				12,50
MAUI ARTS AND CULTURAL CENTER	NONE	PC	ARTS	
ONE CAMERON WAY				
KAHULUI, HI 96732				5,00
MAUI FOOD BANK	NONE	PC	SOCIAL SERVICES	
760 KOLU STREET				
VAILUKU, HI 96793				5,00
MEOOWZRESQ	NONE	PC	ENVIRONMENT	
960 N. TUSTIN ST #200				
DRANGE, CA 92867				5,00
MIND OC	NONE	PC	MEDICAL/HEALTH	
18650 MACARTHUR BLVD, SUITE 220 IRVINE, CA 92612				1,500,00
MISSION EDGE	NONE	PC	SOCIAL SERVICES	
2820 ROOSEVELT ROAD, SUITE 104				
SAN DIEGO, CA 92106				15,00

3 Grants and Contributions Paid During the Y	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	
MOUNT SAINT MARY'S UNIVERSITY	NONE	PC	EDUCATION	
10 CHESTER PLACE LOS ANGELES, CA 90007				5,00
MOUNT VERNON LADIES' ASSOCIATION OF THE UNION	NONE	PC	ENVIRONMENT	
P.O. BOX 110 MOUNT VERNON, VA 22121				25,000
MOVEMENT STRATEGY CENTER	NONE	PC	EDUCATION	
436 14TH STREET, SUITE 425 OAKLAND, CA 94612				10,000
MY DAY COUNTS 225 WEST CARL KARCHER WAY ANAHEIM, CA 92801	NONE	PC	SOCIAL SERVICES	28,000
,				,
NATIONAL NETWORK OF ABORTION FUNDS PMB 16009	NONE	PC	MEDICAL/HEALTH	
BEAVERTON, OR 97008-7015				250,000
NEW VENTURE FUND 1828 L STREET NW, SUITE 300-A WASHINGTON, DC 20036	NONE	PC	SOCIAL SERVICES	1,000,000
				, ,
NEW VISTA SCHOOL 23092 MILL CREEK DRIVE	NONE	PC	EDUCATION	50.00
LAGUNA HILLS, CA 92653				50,000
NORTHEAST FLORIDA REGIONAL STEM2 HUB 7842 MONETEREY BAY DRIVE	NONE	PC	EDUCATION	
JACKSONVILLE, FL 32256				25,000
DAKLAND PUBLIC EDUCATION FUND PO BOX 71005	NONE	PC	SOCIAL SERVICES	
DAKLAND, CA 94612				200,000
OC COMMUNITY FOUNDATION 4041 MACARTHUR BLVD #510	NONE	PC	SOCIAL SERVICES	
NEWPORT BEACH, CA 92660				113,500

3 Grants and Contributions Paid During the Y	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	Contribution	
OC PUBLIC LIBRARIES	NONE	PC	SOCIAL SERVICES	
1501 E. ST ANDREWS PL, 2ND FLOOR	NONE		BOCIAL BERVICED	
SANTA ANA, CA 92705				250,00
OCEAN INSTITUTE	NONE	PC	ENVIRONMENT	
24200 DANA POINT HARBOR DR.				
DANA POINT, CA 92629				7,50
OCSP CAT RESCUE	NONE	PC	ENVIRONMENT	
17870 NEWHOPE STREET, SUITE 104-138				
FOUNTAIN VALLEY, CA 92708				5,000
OCTANE FOUNDATION FOR INNOVATION	NONE	PC	MEDICAL/HEALTH	
65 ENTERPRISE				
ALISO VIEJO, CA 92656				333,000
ONEOC	NONE	PC	SOCIAL SERVICES	
1901 E. FOURTH STREET STE 100				
SANTA ANA, CA 92705				75,000
ORANGE COAST COLLEGE FOUNDATION	NONE	PC	MEDICAL/HEALTH	
2701 FAIRVIEW RD		10		
COSTA MESA, CA 92626				257,300
ORANGE COUNTY BIRD OF PREY CENTER	NONE	PC	EDUCATION	
25422 TRABUCO ROAD #105-541		10		
LAKE FOREST, CA 92630-2797				2,000
ORANGE COUNTY CONGREGATION COMMUNITY	NONE	PC	SOCIAL SERVICES	
ORGANIZATION P.O. BOX 190				
ANAHEIM, CA 92815				75,000
	NONE			
ORANGE COUNTY DEPARTMENT OF EDUCATION 200 KALMUS DRIVE, P.O. BOX 9050,	NONE	PC	EDUCATION	
B-1017 COSTA MESA, CA 92628				800,000
ORANGE COUNTY JAPANESE AMERICAN	NONE	PC	SOCIAL SERVICES	
ASSOCIATION 17332 IRVINE BLVD., SUITE 160				
TUSTIN, CA 92780				5,00
Total from continuation sheets				

3 Grants and Contributions Paid During the Y	(ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	A
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	Amount
DRANGE COUNTY MUSEUM OF ART	NONE	PC	ARTS	
3333 AVENUE OF THE ARTS COSTA MESA, CA 92626				150,00
DRANGE COUNTY SCHOOL OF THE ARTS FOUNDATION	NONE	PC	EDUCATION	
1010 N. MAIN STREET SANTA ANA, CA 92701				270,000
DRANGE COUNTY UNITED WAY	NONE	PC	SOCIAL SERVICES	
18012 MITCHELL AVE. SOUTH IRVINE, CA 92614				320,000
ORANGEWOOD FOUNDATION	NONE	PC	SOCIAL SERVICES	
1575 EAST 17TH STREET SANTA ANA, CA 92705				58,000
P.E.F. ISRAEL ENDOWMENT FUNDS, INC.	NONE	PC	RELIGIOUS	
630 THIRD AVENUE, 15TH FLOOR NEW YORK, NY 10017	NONE			1,270,000
PACIFIC MARINE MAMMAL CENTER 20612 LAGUNA CANYON ROAD LAGUNA BEACH, CA 92651	NONE	PC	ENVIRONMENT	4,000
AGONA BEACH, CA 52051				±,000
PACIFIC WHALE FOUNDATION 300 MA'ALAEA RD.STE. 211	NONE	PC	SOCIAL SERVICES	
WAILUKU, HI 96793				25,000
PACIFIC ZEN INSTITUTE P.O.BOX 2972	NONE	PC	MEDICAL/HEALTH	
SANTA ROSA, CA 95405				50,000
PEACE AND JUSTICE LAW CENTER 2501 E. CHAPMAN AVE, SUITE 245 FULLERTON, CA 92831	NONE	PC	SOCIAL SERVICES	100,00
PHILHARMONIC SOCIETY OF OC 1124 MAIN ST., SUITE B IRVINE, CA 92614	NONE	PC	ARTS	5,000

3 Grants and Contributions Paid During the Ye	ear (Continuation)	1		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
PIONEER VPO	NONE	PC	EDUCATION	
4810 POINT FOSDICK DR, PMB 292 JIG HARBOR, WA 98335				7,50
PLANNED PARENTHOOD FEDERATION OF AMERICA	NONE	PC	MEDICAL/HEALTH	
123 WILLIAM ST., 10TH FLOOR NEW YORK, NY 10038				200,000
PLANNED PARENTHOOD MAR MONTE	NONE	PC	MEDICAL/HEALTH	
1691 THE ALAMEDA SAN JOSE, CA 95162				50,000
POPULATION SERVICES INTERNATIONAL 1120 19TH STREET NW, SUITE 600	NONE	PC	MEDICAL/HEALTH	
WASHINGTON, DC 20036-3605				100,000
PROSTITUTION RESEARCH & EDUCATION PO BOX 16254	NONE	PC	SOCIAL SERVICES	
SAN FRANCISCO, CA 94116-0254				2,500
PURDY ELEMENTARY PTA 13815 62ND AVE NW GIG HARBOR, WA 98332	NONE	PC	EDUCATION	7,500
				,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
QUAN AM BUDHIST MEDITATION 12670 18TH STREET	NONE	PC	RELIGIOUS	
REDLANDS, CA 92373				5,000
RAINFOREST FOUNDATION US P.O.BOX 26908	NONE	PC	ENVIRONMENT	
BROOKLYN, NY 11202				100,000
REGENTS OF THE UNIVERSITY OF MICHIGAN C/O U-M GIFT AND RECORDS ADMIN, 3003 SOUTH STATE STREET, SUITE 8000 ANN	NONE	PC	SOCIAL SERVICES	
ARBOR, MI 48109				40,000
RENEWABLE FARMS 468 S. COATE ROAD	NONE	PC	MEDICAL/HEALTH	
ORANGE, CA 92869 Total from continuation sheets				55,000

3 Grants and Contributions Paid During the Ye	ear (Continuation)	1		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	Contribution	
SAMUELI ACADEMY	NONE	PC	EDUCATION	
1901 N. FAIRVIEW STREET				
SANTA ANA, CA 92706				360,46
SAN CLEMENTE AQUATIC TEAM CORPORATION	NONE	PC	SOCIAL SERVICES	
P.O. BOX 73666				
SAN CLEMENTE, CA 92673				2,50
SAN CLEMENTE MILITARY FAMILY OUTREACH	NONE	PC	SOCIAL SERVICES	
2001 CALLE FRONTERA				
SAN CLEMENTE, CA 92673				15,00
SANTA CLARA UNIVERSITY SCHOOL OF LAW	NONE	PC	EDUCATION	
500 EL. CAMINO REAL	NONE	10	boomion	
SANTA CLARA, CA 95053				2,50
,				,
SCAD RESEARCH INC.	NONE	PC	MEDICAL/HEALTH	
10115 E. BELL ROAD, SUITE 107-127	NONE	10		
SCOTTSDALE, AZ 85260				10,00
				,
SEGERSTROM CENTER FOR THE ARTS	NONE	PC	ARTS	
SEGERSTROM HALL, 600 TOWN CENTER DRIVE				
COSTA MESA, CA 92626				200,00
SEVENTH GENERATION FUND FOR	NONE	PC	ENVIRONMENT	
INDIGENOUS PEOPLES	NONE	10		
PO BOX 4569				
ARCATA, CA 95518				100,00
SIERRA HEALTH FOUNDATION: CENTER FOR	NONE	PC	ENVIRONMENT	
HEALTH				
PROGRAM MANAGEMENT, 1321 GARDEN				
HIGHWAY SACRAMENTO, CA 95833				250,00
SIERRA VISTA ELEMENTARY PTA	NONE	PC	EDUCATION	
1811 NORTH PLACENTIA AVE				
PLACENTIA, CA 92870				2,50
SOCIAL AND ENVIRONMENTAL	NONE	PC	SOCIAL SERVICES	
ENTREPRENEURS				
23564 CALABASAS ROAD, SUITE 201				
CALABASAS, CA 91302				200,00

3 Grants and Contributions Paid During the Ye	ear (Continuation)	1		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
SOGOREA TE' LAND TRUST	NONE	PC	ENVIRONMENT	
2501 HARRISON STREET				
DAKLAND, CA 94612				100,000
SOUTH BAY CHALLENGE, INC	NONE	PC	SOCIAL SERVICES	
1919 TORRANCE BLVD.				
FORRANCE, CA 90501				3,000
SOUTHERN CALIFORNIA GRANTMAKERS	NONE	PC	SOCIAL SERVICES	
1000 NORTH ALAMEDA STREET, SUITE 230				
LOS ANGELES, CA 90012				7,333
SOUTHERN COUNTIES RESCUE INC.	NONE	PC	ENVIRONMENT	
1850 WHITTIER AVENUE, SUITE H106				
COSTA MESA, CA 92627				5,000
SOUTHWEST LENDING CLOSET	NONE	PC	SOCIAL SERVICES	
218 N. CENTRAL AVE.				
AVONDALE, AZ 85392				5,000
ST. MARGARET'S EPISCOPAL SCHOOL	NONE	PC	EDUCATION	
31641 LA NOVIA	NONE	10		
SAN JUAN CAPISTRANO, CA 92675				35,000
STANDWITHUS	NONE	PC	RELIGIOUS	
6505 WILSHIRE BLVD., 5TH FLOOR		10		
LOS ANGELES, CA 90048				150,000
STARS & STRIPES CHILDREN'S FOUNDATION	NONE	PC	SOCIAL SERVICES	
8149 SPECTRUM				
IRVINE, CA 92618				25,000
START RESCUE	NONE	PC	SOCIAL SERVICES	
P.O.BOX 4792				
VALLEY VILLAGE, CA 91617				1,000
STEM NEXT OPPORTUNITY FUND	NONE	PC	EDUCATION	
2305 HISTORIC DECATUR ROAD, SUITE 100			DESCRITON	
, SAN DIEGO, CA 92106				500,000

3 Grants and Contributions Paid During the Y	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	Amount
STUDENTS RUN LA	NONE	PC	SOCIAL SERVICES	
5252 CREBS AVENUE				
FARZANA, CA 91356				2,50
SURFRIDER FOUNDATION	NONE	PC	ENVIRONMENT	
PO BOX 73550				
SAN CLEMENTE, CA 92673				23,500
FALLER SAN JOSE HOPE BUILDERS	NONE	PC	SOCIAL SERVICES	
801 NORTH BROADWAY				
SANTA ANA, CA 92701				5,000
TARBUT V'TORAH COMMUNITY DAY SCHOOL	NONE	PC	EDUCATION	
5 FEDERATION WAY				
IRVINE, CA 92603				25,000
TELLURIDE FOUNDATION	NONE	PC	SOCIAL SERVICES	
PO BOX 4222				
TELLURIDE, CO 81435				30,000
TELLURIDE SCIENCE RESEARCH CENTER	NONE	PC	SOCIAL SERVICES	
PO BOX 2429				
TELLURIDE, CO 81435				50,000
TEMPLE BETH EL	NONE	PC	RELIGIOUS	
2A LIBERTY				
ALISO VIEJO, CA 92656-3372				120,000
TESLA SCIENCE CENTER AT WARDENCLYFFE	NONE	PC	EDUCATION	
PO BOX 552				
SHOREHAM, NY 11786				125,000
TGR FOUNDATION	NONE	PC	EDUCATION	
1 TIGER WOOD WAY				
ANAHEIM, CA 92801				25,000
THE "1939" CLUB	NONE	PC	RELIGIOUS	
369 SOUTH DOHENY DRIVE #1402				
BEVERLY HILLS, CA 90211 Total from continuation sheets				1,00

3 Grants and Contributions Paid During the Ye		1		
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	Contribution	Anount
THE ASPEN INSTITUTE INC. 2300 N STREET, SUITE 700 WASHINGTON, DC 20037	NONE	PC	EDUCATION	100,00
, THE ASSOCIATION OF FUNDRAISING PROFESSIONALS PO BOX 8133	NONE	PC	SOCIAL SERVICES	
FOUNTAIN VALLEY, CA 92728				5,00
THE BODY AGENCY COLLECTIVE 6106 HARVARD AVENUE GLENN ECHO, MD 20812	NONE	PC	MEDICAL/HEALTH	100.00
JIENN ECHO, MJ 20012				100,00
THE BRIDGESPAN GROUP TWO COPLEY PLACE, SUITE 3700B BOSTON, MA 02116	NONE	PC	RELIGIOUS	450,00
THE CDM FOUNDATION 2549 EASTBLUFF DR, SUITE 259 NEWPORT BEACH, CA 92660	NONE	РC	EDUCATION	2,00
THE ECOLOGY CENTER 32701 ALIPAZ STEET SAN JUAN CAPISTRANO, CA 92675	NONE	PC	ENVIRONMENT	60,00
THE INTERNATIONAL SOCIETY FOR ENVIRONMENTALLY ACQUIRED ILLNESS	NONE	PC	MEDICAL/HEALTH	
7320 N. LA CHOLLA BLVD., STE 154, #147 TUCSON, AZ 85741				17,00
THE LIVING DESERT 47-900 PORTOLA AVENUE	NONE	PC	ENVIRONMENT	
PALM DESERT, CA 92260				1,00
THE NATIONAL ACADEMY OF ENGINEERING OFFICE OF DEVELOPMENT, P.O. BOX 936138 ATLANTA, GA 31193-6135	NONE	PC	EDUCATION	10,00
THE RESCUE HOUSE 1150 GARDEN VIEW ROAD #231	NONE	PC	ENVIRONMENT	
ENCINITAS, CA 92023 Total from continuation sheets				10,00

3 Grants and Contributions Paid During the Y	ear (Continuation)	1		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	Contribution	
THE UNIVERSITY OF ARIZONA FOUNDATION	NONE	PC	MEDICAL/HEALTH	
PO BOX 210036	NONE	10		
TUCSON, AZ 85721				10,00
THE WOODEN FLOOR	NONE	PC	SOCIAL SERVICES	
1810 NORTH MAIN ST				25 00
SANTA ANA, CA 92706				35,00
THRIVE SANTA ANA, INC.	NONE	PC	ENVIRONMENT	
P.O. BOX 1935				
SANTA ANA, CA 92702				100,00
TIDES CENTER P.O. BOX 889389	NONE	PC	EDUCATION	
LOS ANGELES, CA 90088-9389				350,00
,				,
TIDES FOUNDATION	NONE	PC	SOCIAL SERVICES	
PO BOX 889389				
LOS ANGELES, CA 90088-9389				300,00
TRANS LIFELINE	NONE	PC	SOCIAL SERVICES	
548 MARKET STREET PMB 15337		10		
SAN FRANCISCO, CA 94104-5401				100,00
UC BERKELEY FOUNDATION	NONE	PC	EDUCATION	
1995 UNIVERSITY AVENUE, SUITE 400 BERKELEY, CA 94704-1070				25,00
UC REGENTS	NONE	PC	EDUCATION	
UC ANR DEVELOPMENT SERVICES, 2801				484.45
SECOND STREET DAVIS, CA 95618				150,00
UCI FOUNDATION	NONE	PC	EDUCATION	
903 W. PELTASON				
IRVINE, CA 92697				298,71
UCLA FOUNDATION	NONE	PC	EDUCATION	
HENRY SAMUELI SCHOOL OF ENGINEERING,				
7256 BOLETER HALL BOX 951600 LOS				37E 00
ANGELES, CA 90095-1600 Total from continuation sheets				225,00

3 Grants and Contributions Paid During the Ye	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	Contribution	
JNITED STATES NAVAL ACADEMY	NONE	PC	EDUCATION	
FOUNDATION				
274 WOOD RD				
ANNAPOLIS, MD 21402				10,000
JNIVERSITY OF MASSACHUSETTS	NONE	PC	EDUCATION	
FOUNDATION				
100 CARLSON AVE, BLDG. 12				
NEWTON, MA 02459				12,500
UPSTREAM USA, INC.	NONE	PC	MEDICAL/HEALTH	
2 OLIVER STREET SUITE 402				
BOSTON, MA 02109				1,000,000
URBAN ALCHEMY	NONE	PC	MEDICAL/HEALTH	
1035 MARKET STREET, SUITE 150				
SAN FRANCISCO, CA 94103				50,000
JRGE: UNITE FOR REPRODUCTIVE & GENDER	NONE	PC	MEDICAL/HEALTH	
EQUITY				
1012 14TH STREET NW, SUITE 305				
WASHINGTON, DC 20005				200,000
USA WARRIORS ICE HOCKEY PROGRAM	NONE	PC	SOCIAL SERVICES	
13424 QUERY MILL ROAD				26 500
NORTH POTOMAC, MD 20878-3962				26,500
USA WATER POLO	NONE	PC	SOCIAL SERVICES	
6 MORGAN, SUITE 150 IRVINE, CA 92618				5,000
JSC LEONARD DAVIS SCHOOL OF JERONTOLOGY	NONE	PC	MEDICAL/HEALTH	
3715 MCCLINTOCK AVENUE, SUITE 110				
LOS ANGELES, CA 90089				20,000
USC SHOAH FOUNDATION	NONE	PC	RELIGIOUS	
1150 S. OLIVE STREET, SUITE 2000				
LOS ANGELES, CA 90015				25,000
VANGUARD UNIVERSITY	NONE	PC	SOCIAL SERVICES	
55 FAIR DRIVE				
COSTA MESA, CA 92706				15,000

3 Grants and Contributions Paid During the Y	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	Contribution	, anount
VIET RAINBOW OF ORANGE COUNTY	NONE	PC	SOCIAL SERVICES	
8682 BEACH BLVD., #200				
BUENA PARK, CA 90620				57,50
VINTAGE CLUB	NONE	PC	SOCIAL SERVICES	
75001 VINTAGE DR W				
INDIAN WELLS, CA 92210				12,00
WEST MARIN COMMUNITY SERVICES	NONE	PC	SOCIAL SERVICES	
PO BOX 1093				
POINT REYES STATION, CA 94956				10,00
WILD AT HEART INC	NONE	PC	ENVIRONMENT	
319840 N. 45TH ST.				
CAVE CREEK, AZ 85331				10,00
WOODSTOCK TIMEBANK	NONE	PC	MEDICAL/HEALTH	
CROSIER MILLS ENTERPRISE CENTER, 601				
, UPLAND AVE, SUITE 214 UPLAND, PA				
19015				100,00
WORLD RESOURCES INSTITUTE	NONE	PC	ENVIRONMENT	
10 G STREET NE #800	NONE	10		
WASHINGTON, DC 20002				2,000,00
				,,.
ZACHOR LEGAL INSTITUTE	NONE	PC	RELIGIOUS	
P.O. BOX 6774	NONE	10		
BOZEMAN, MT 59771				25,00
ZAKA NORTH INC.	NONE	PC	MEDICAL/HEALTH	
2920 AVENUE R., SUITE 208				
BROOKLYN, NY 11229				200,00

Schedule B

(Form 990)

Department of the Treasury Internal Revenue Service

Name of the organization

Organization type (check one):

Schedule of Contributors

OMB No. 1545-0047

Attach to Form 990, 990-EZ, or 990-PF. Go to www.irs.gov/Form990 for the latest information.



Employer identification number

33-0758237

SAMUELI FOUNDATION

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	X 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

X 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 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 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), 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 (entering "N/A" in column (b) instead of the contributor name and address), 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 for an *exclusively* set of the parts unless to the set of the year for an *exclusively* for the parts unless to the set of the year for year.

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

	B (Form 990) (2023)		Page 2
Name of o	rganization	Emp	oyer identification number
SAMUELI	FOUNDATION		33-0758237
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	S95NGT 201 S PHILLIPS AVENUE, SUITE 200 SIOUX FALLS, SD 57104	\$50,302,303.	Person Payroll Noncash X (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	H&S INVESTMENTS I, LLC 2101 E. COAST HIGHWAY, THIRD FLOOR CORONA DEL MAR, CA 92625	\$\$	Person Payroll Noncash X (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)

Schedule B (Form 990) (2023)

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	B (Form 990) (2023)			Page
Name of o	rganization		Employ	yer identification number
SAMUELI	FOUNDATION		33	3-0758237
Part II	Noncash Property (see instructions). Use duplicate copies of Part II i	if additional space is needed	d.	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate (See instructions		(d) Date received
1	STOCKS	-		
		\$50,302	303.	12/31/23
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate (See instructions		(d) Date received
2	STOCKS	-		
		\$2,898	509.	12/31/23
(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
		-		
		_ \$		<u> </u>

Schedule B (Form 990) (2023)

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Schedule	B (Form 990) (2023)			Page 4				
Name of o	organization			Employer identification number				
SAMUELI	FOUNDATION			33-0758237				
Part III				hat total more than \$1,000 for the year				
	from any one contributor. Complete columns (a) completing Part III, enter the total of exclusively religious, c	haritable, etc., contributions of \$1,000 or	less for the year. (Enter this info.	once.) \$				
(a) No	Use duplicate copies of Part III if additional s	space is needed.						
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Des	cription of how gift is held				
<u> </u>								
		(a) Transfer of sid						
		(e) Transfer of git	t					
	Transferee's name, address, ar	nd ZIP + 4	Relationship of tra	ansferor to transferee				
(a) No. from	(b) Purpose of gift (c) Use of gift		(d) Des	cription of how gift is held				
Part I			(0) Des					
	(e) Transfer of gift							
	Transferee's name, address, ar	Relationship of tra	ansferor to transferee					
			Holdtonionip of ar					
		[
(a) No. from								
from Part I	(b) Purpose of gift	(c) Use of gift	(d) Des	cription of how gift is held				
		(e) Transfer of git	it i					
			_					
	Transferee's name, address, an	nd ZIP + 4	Relationship of tra	ansferor to transferee				
(a) No.			I					
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Des	cription of how gift is held				
<u> </u>								
		(e) Transfer of gif						
	Transferee's name, address, ar	nd ZIP + 4	Relationship of tra	ansferor to transferee				
	·							

Schedule B (Form 990) (2023)

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FORM 99	90-PF INTEREST	ON	SAVIN	NGS AN	D !	TEMPO	DRARY	CA	SH	I INVESTME	ENTS	STA	TEMENT	1
SOURCE						(A) EVENU R BOO		N	ЕT	(B) T INVESTME INCOME	ENT		(C) DJUSTE I INCO	
INTERES	ST INCOME					7	19,492.			719,	492.			
TOTAL 7	FO PART I, LINE	3				7	19,492.	_		719,	492.			
FORM 99	90-PF	GA.	IN OR	(LOSS)]	FROM	SALE	OF	' A	ASSETS		STA	TEMENT	2
DESCRII	(A) PTION OF PROPER	TY								MANNER ACQUIRED		ATE UIRED	DATE	SOLE
3520 SH STOCK	HARES OF BROADC	ОМ							_		10/	04/23	10/04	4/23
	(B) GROSS SALES PRICE	1		C) JE AT)F ACQ	•	EXI	(D) PENSE SALE	OF	•	(E) DEPREC.		GAIN	(F) OR LO	SS
	2,881,15	3.		2,898,5	09.				0.		0.		-1	7,356.
DESCRII	(A) PTION OF PROPER	TY								MANNER ACQUIRED		ATE UIRED	DATE	SOLI
14823 S STOCK	SHARES OF BROAD	СОМ									12/	13/23	12/1	3/23
	(B) GROSS SALES PRICE			C) JE AT)F ACQ			(D) PENSE SALE	OF	1	(E) DEPREC.		CATN	(F) OR LO	
	15,951,15			16,026,0			JAUE		0.		0.	GAIN		4 ,877.
	(A) PTION OF PROPER	TY								MANNER ACQUIRED		ATE UIRED	DATE	SOLE
DESCRIE											12/	14/23	12/1	4/23
	SHARES OF BROAD	СОМ												
14549 \$	SHARES OF BROAD (B) GROSS SALES PRICE			C) JE AT DF ACQ		EXI	(D) PENSE SALE	OF	•	(E) DEPREC.			(F) OR LO	a c

SAMUELI	FOUNDATION	

33-0758237

DESCRIPT	(A) TION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
14385 SH STOCK	IARES OF BROADCO	 M			12/15/23	12/15/23
	(B) GROSS	(C)	(D)	(E)		(F)
	SALES PRICE	VALUE AT TIME OF ACQ.	EXPENSE OF SALE	DEPREC	. GAIN	OR LOSS
	16,209,034.	16,143,552.).	0.	65,482.
DESCRIPT	(A) TION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
1800 SHA STOCK	ARES OF BROADCOM				12/18/23	12/18/23
	(B)	(C)	(D)	(E)		(F)
	GROSS SALES PRICE	VALUE AT TIME OF ACQ.	EXPENSE OF SALE	DEPREC	. GAIN	OR LOSS
-	2,059,935.	2,043,414.).	0.	16,521.
	(A) TION OF PROPERTY					DATE SOLD
COMPUTER	R EQUIPMENT	(2)		PURCHASED	01/01/23	
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC	. GAIN	(F) OR LOSS
	840.	1,121.).	0.	-281.
	I OR LOSS FROM S	ALE OF ASSETS				33,160.
	GAINS DIVIDENDS					0.
	D FORM 990-PF, P					33,160.
		·				
FORM 990)-PF	LEG	AL FEES		STA	TEMENT 3
DESCRIPT	FION	(A) EXPENSES PER BOOK		ST- ADJU	C) USTED (INCOME	(D) CHARITABLE PURPOSES
				····· ····		

96,952.

TO FM 990-PF, PG 1, LN 16A

39 STATEMENT(S) 2, 3 2023.05000 SAMUELI FOUNDATION 206767_1

24,238.

38,781.

FORM 990-PF	ACCOUNTI	TATEMENT 4		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	26,475.	6,619.		10,590.
 TO FORM 990-PF, PG 1, LN 16B =	26,475.	6,619.		10,590.

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FORM 990-PF
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OTHER PROFESSIONAL FEES

STATEMENT 5

DESCRIPTION	(A)	(B)	(C)	(D)
	EXPENSES	NET INVEST-	ADJUSTED	CHARITABLE
	PER BOOKS	MENT INCOME	NET INCOME	PURPOSES
CONSULTING FEES	804,986.	0.		804,986.
OUTSIDE SERVICES	539.	0.		539.
MANAGEMENT FEES	60,000.	0.		12,000.
	865,525.	0.		817,525.

FORM 990-PF	TAX	ES	S	TATEMENT 6
DESCRIPTION	(A)	(B)	(C)	(D)
	EXPENSES	NET INVEST-	ADJUSTED	CHARITABLE
	PER BOOKS	MENT INCOME	NET INCOME	PURPOSES
FEDERAL TAX	32,000.	0.		0.
TAXES & LICENSES	805.	0.		0.
TO FORM 990-PF, PG 1, LN 18	32,805.	0.		0.

FORM 990-PF	OTHER E	XPENSES	STATEMENT 7		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OFFICE EXPENSE	83,938.	41,972.		0.	
INSURANCE	26,224.	13,112.		Ο.	
POSTAGE	233.	116.		0.	
TELEPHONE AND INTERNET	13,226.	3,306.		6,613.	
BENEFIT PLAN ADMINISTRATION	2,566.	257.		2,053.	
PAYROLL PROCESSING	8,902.	890.		7,121.	
CUSTODIAL FEES	914.	228.		457.	
DUES AND SUBSCRIPTIONS	2,782.	0.		2,782.	
RECRUITING	8,706.	0.		0.	
TO FORM 990-PF, PG 1, LN 23	147,491.	59,881.		19,026.	

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT

STATEMENT 8

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
SOFTWARE - WEBSITE	14,700.	14,700.	0.
SOFTWARE - IOS APP	6,000.	6,000.	0.
GRANTMAKING WEBSITE	3,500.	3,500.	0.
GRANTMAKING WEBSITE	3,695.	3,695.	0.
TV SCREENS	3,233.	3,233.	0.
DELL COMPUTER MONITOR	522.	305.	217.
DELL XPS COMPUTER	2,159.	1,259.	900.
DELL MONITOR	1,072.	505.	567.
DELL DESKTOP OPTIPLEX 7090			
SMALL FORM	1,289.	609.	680.
MACBOOK AIR	1,296.	611.	685.
DELL DESKTOP	1,489.	497.	992.
DELL OPTIPLEX SMALL FORM	1,486.	372.	1,114.
SURFACE LAPTOP	1,836.	459.	1,377.
DELL LAPTOP	1,336.	223.	1,113.
APPLE MACBOOK	1,836.	153.	1,683.
DELL LAPTOP, MONITORS KEYBOARD			
MOUSE	3,999.	222.	3,777.
TOTAL TO FM 990-PF, PART II, LN 14	49,448.	36,343.	13,105.

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FORM 990-PF	OTHER ASSETS	STATEMENT 9	
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
OTHER ASSETS	757.	1,966.	1,966.
DEPOSITS	9,866.	8,866.	8,866.
DUE FROM RELATED ENTITIES	2,870.	1,998.	1,998.
SOFTWARE IMPLEMENTATION	0.	43,691.	43,691.
TO FORM 990-PF, PART II, LINE 15	13,493.	56,521.	56,521.

FORM 990-PF PART VII - LIST OF OFFICERS, DIRECTO TRUSTEES AND FOUNDATION MANAGERS					
NAME AND ADDRESS	TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB		
SUSAN SAMUELI 2101 E. COAST HIGHWAY, SUITE 300 CORONA DEL MAR, CA 92625	PRESIDENT 10.00	0.	0.	0.	
HENRY SAMUELI 2101 E. COAST HIGHWAY, SUITE 300 CORONA DEL MAR, CA 92625	VICE PRESIDENT 10.00	0.	0.	0.	
MICHAEL SCHULMAN 2101 E. COAST HIGHWAY, SUITE 300 CORONA DEL MAR, CA 92625	CFO & SECRETARY 10.00	0.	0.	٥.	
LINDSEY SPINDLE 2101 E. COAST HIGHWAY, SUITE 300 CORONA DEL MAR, CA 92625	DIRECTOR 65.00	940,874.	55,831.	٥.	
ERIN SAMUELI 2101 E. COAST HIGHWAY, SUITE 300 CORONA DEL MAR, CA 92625	DIRECTOR 10.00	٥.	0.	0.	
TOTALS INCLUDED ON 990-PF, PAGE 6,	PART VII	940,874.	55,831.	0.	

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FORM 990-PF

STATEMENT 11

NAME OF MANAGER

SUSAN SAMUELI HENRY SAMUELI