

For calendar year 2024 or tax year beginning

, and ending

Name of foundation MAY AND STANLEY SMITH CHARITABLE TRUST		A Employer identification number ** - ** 2075
Number and street (or P.O. box number if mail is not delivered to street address) 101 LARKSPUR LANDING CIRCLE	Room/suite 223	B Telephone number 415-332-0166
City or town, state or province, country, and ZIP or foreign postal code LARKSPUR, CA 94939		C If exemption application is pending, check here ... <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input checked="" type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ... <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 456,083,110.	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ... <input type="checkbox"/>
(Part I, column (d), must be on cash basis.)		

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)</small>		(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				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		10,650,185.	9,248,067.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		15,986,529.			
b Gross sales price for all assets on line 6a 98,630,415.					
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income		163,908.	163,908.		STATEMENT 2
12 Total. Add lines 1 through 11		26,800,622.	9,411,975.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	808,177.			618,624.
	14 Other employee salaries and wages	1,241,316.			1,241,293.
	15 Pension plans, employee benefits	466,079.			486,366.
	16a Legal fees STMT 3	16,925.			17,875.
	b Accounting fees STMT 4	169,555.			85,464.
	c Other professional fees STMT 5	2,374,719.			126,852.
	17 Interest				
	18 Taxes STMT 6	513,419.			269.
	19 Depreciation and depletion				
	20 Occupancy	234,411.			234,098.
	21 Travel, conferences, and meetings	131,339.			131,749.
	22 Printing and publications				
	23 Other expenses STMT 7	3,950,278.			120,923.
24 Total operating and administrative expenses. Add lines 13 through 23	9,906,218.			3,063,513.	
25 Contributions, gifts, grants paid	19,559,226.			18,991,726.	
26 Total expenses and disbursements. Add lines 24 and 25	29,465,444.	N/A		22,055,239.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements ...	-2,664,822.				
b Net investment income (if negative, enter -0-)		9,411,975.			
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only.	Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	18,583,554.	21,005,468.	21,005,468.
	3 Accounts receivable 787,847.			
	Less: allowance for doubtful accounts	546,055.	787,847.	787,847.
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use	5,144.	5,037.	5,037.
	9 Prepaid expenses and deferred charges	317,939.	302,492.	302,492.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 9	245,891,883.	251,790,210.	251,790,210.
	c Investments - corporate bonds STMT 10	73,958,026.	86,590,999.	86,590,999.
	11 Investments - land, buildings, and equipment: basis			
Less: accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other STMT 11	89,694,740.	95,601,057.	95,601,057.	
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation				
15 Other assets (describe)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	428,997,341.	456,083,110.	456,083,110.	
Liabilities	17 Accounts payable and accrued expenses	836,561.	855,406.	
	18 Grants payable	8,007,500.	8,575,000.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe)			
23 Total liabilities (add lines 17 through 22)	8,844,061.	9,430,406.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. <input type="checkbox"/>			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. <input checked="" type="checkbox"/>			
	26 Capital stock, trust principal, or current funds	201,336,001.	201,336,001.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	218,817,279.	245,316,703.	
29 Total net assets or fund balances	420,153,280.	446,652,704.		
30 Total liabilities and net assets/fund balances	428,997,341.	456,083,110.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	420,153,280.
2 Enter amount from Part I, line 27a	2	-2,664,822.
3 Other increases not included in line 2 (itemize) SEE STATEMENT 8	3	29,164,246.
4 Add lines 1, 2, and 3	4	446,652,704.
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	446,652,704.

Part IV Capital Gains and Losses for Tax on Investment Income N/A

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b			
c			
d			
e			
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e			
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8	{ }		3

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instructions)	1	376,479.
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) of Part I, line 12, col. (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0.
3 Add lines 1 and 2	3	376,479.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	376,479.
6 Credits/Payments:		
a 2024 estimated tax payments and 2023 overpayment credited to 2024	6a	410,958.
b Exempt foreign organizations - tax withheld at source	6b	0.
c Tax paid with application for extension of time to file (Form 8868)	6c	100,000.
d Backup withholding erroneously withheld	6d	0.
7 Total credits and payments. Add lines 6a through 6d	7	510,958.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	134,479.
11 Enter the amount of line 10 to be: Credited to 2025 estimated tax 134,479. Refunded	11	0.

Part VI-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ <u>0.</u> (2) On foundation managers. \$ <u>0.</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ <u>0.</u>		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		X
If "Yes," attach a detailed description of the activities.		
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		X
If "Yes," attach the statement required by <i>General Instruction T</i> .		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. _____ <u>CA</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2024 or the tax year beginning in 2024? See the instructions for Part XIII. If "Yes," complete Part XIII		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		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		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address <u>WWW.SMITHCT.ORG</u>		
14 The books are in care of <u>MAY & STANLEY SMITH CHARITABLE TR</u> Telephone no. <u>415-332-0166</u> Located at <u>101 LARKSPUR LANDING CIRCLE, SUITE 223, LARKSPUR,</u> ZIP+4 <u>94939</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 2024, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		

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.

	Yes	No
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?	1a(1)	X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)	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 reimburse the expenses of, a disqualified person?	1a(4)	X
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)	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, if terminating within 90 days.)	1a(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(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	X
c Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
d Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2024?	1d	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(j)(3) or 4942(j)(5)):		
a At the end of tax year 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024?	2a	X
If "Yes," list the years _____, _____, _____, _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	2b	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. _____, _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	X
b If "Yes," did it have excess business holdings in 2024 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2024.)	3b	N/A
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 2024?	4b	X

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

	Yes	No
5a During the year, did the foundation pay or incur any amount to:		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		X
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?		X
(3) Provide a grant to an individual for travel, study, or other similar purposes?		X
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	X	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?		X
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	X	
c Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
d If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? SEE STATEMENT 12	X	
If "Yes," attach the statement required by Regulations section 53.4945-5(d).		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		X
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A		
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?		X

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RUTH M. COLLINS 101 LARKSPUR LANDING CIRCLE, SUITE 22 LARKSPUR, CA 94939	TRUSTEE 10.00	125,000.	0.	0.
DAVID C CUNEO 101 LARKSPUR LANDING CIRCLE, SUITE 22 LARKSPUR, CA 94939	TRUSTEE 10.00	125,000.	0.	0.
DANIEL F PIOMBO 101 LARKSPUR LANDING CIRCLE, SUITE 22 LARKSPUR, CA 94939	TRUSTEE 10.00	125,000.	0.	0.
WILLIAM SMITH 101 LARKSPUR LANDING CIRCLE, SUITE 22 LARKSPUR, CA 94939	CEO 40.00	433,177.	60,678.	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
AMY FREEMAN - 101 LARKSPUR LANDING CIRCLE, SUITE 223, LARKSPUR, CA	DIRECTOR OF PROGRAMS 40.00	215,316.	42,536.	0.
DANIEL GAFF - 101 LARKSPUR LANDING CIRCLE, SUITE 223, LARKSPUR, CA	DIRECTOR OF GRANTS MGMT 40.00	185,887.	29,825.	0.
JEANINE DALLAMORA ALPERT - 101 LARKSPUR LANDING CIRCLE, SUITE 223, LARKSPUR, CA	PROGRAMS 40.00	152,960.	59,367.	0.
ELISABETH CUTLER - 101 LARKSPUR LANDING CIRCLE, SUITE 223, LARKSPUR, CA	SENIOR PROGRAM OFFICER 40.00	174,132.	30,958.	0.
KELLY KENT - 101 LARKSPUR LANDING CIRCLE, SUITE 223, LARKSPUR, CA	SENIOR PROGRAM OFFICER 40.00	165,039.	28,942.	0.
Total number of other employees paid over \$50,000				0

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

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
RELEVANT WEALTH ADVISORS - 2 BELVEDERE PLACE, SUITE 350, MILL VALLEY, CA 94941	INVESTMENT MANAGER	2,236,881.

Total number of others receiving over \$50,000 for professional services 0

Part VIII-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/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 lines 1 and 2.	Amount
1 N/A	
2	
3 All other program-related investments. See instructions.	

Total. Add lines 1 through 3 0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities	1a	344,775,308.
b	Average of monthly cash balances	1b	20,675,563.
c	Fair market value of all other assets (see instructions)	1c	83,851,812.
d	Total (add lines 1a, b, and c)	1d	449,302,683.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	449,302,683.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	6,739,540.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	442,563,143.
6	Minimum investment return. Enter 5% (0.05) of line 5	6	22,128,157.

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

1	Minimum investment return from Part IX, line 6	1	22,128,157.
2a	Tax on investment income for 2024 from Part V, line 5	2a	376,479.
b	Income tax for 2024. (This does not include the tax from Part V.)	2b	
c	Add lines 2a and 2b	2c	376,479.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	21,751,678.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	21,751,678.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	21,751,678.

Part XI Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	22,055,239.
b	Program-related investments - total from Part VIII-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4	4	22,055,239.

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Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7				21,751,678.
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only			5,760,172.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2024:				
a From 2019				
b From 2020				
c From 2021				
d From 2022				
e From 2023				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2024 from Part XI, line 4: \$ 22,055,239.				
a Applied to 2023, but not more than line 2a			5,760,172.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2024 distributable amount				16,295,067.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2024 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				5,456,611.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2019 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2020				
b Excess from 2021				
c Excess from 2022				
d Excess from 2023				
e Excess from 2024				

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

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

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

Table with 5 columns: (a) 2024, (b) 2023, (c) 2022, (d) 2021, (e) Total. Rows include 2a-e (Qualifying distributions) and 3a-d (Alternative tests).

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

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

NONE

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:

SEE STATEMENT 13

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

c Any submission deadlines:

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

Part XIV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
GRANTS APPROVED IN 2024, PAYABLE IN FUTURE YEARS, CA 94925	N/A	PUBLIC	GENERAL	8,575,000.
GRANTS APPROVED IN PRIOR YEARS, PAID IN 2024 (INCLUDED ABOVE), CA 94925	N/A	PUBLIC	GENERAL	-8,007,500.
VARIOUS ORGANIZATIONS SEE ATTACHED DETAILS, CA 94925	N/A	PUBLIC	GENERAL	18,991,726.
Total				3a 19,559,226.
b Approved for future payment				
VARIOUS ORGANIZATIONS SEE ATTACHED DETAILS, CA 94925	N/A	PUBLIC	GENERAL	8,395,000.
Total				3b 8,395,000.

Part XVI Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

Table with 3 columns: Question, Yes, No. Contains questions 1a through 1c regarding transfers and transactions with noncharitable exempt organizations.

Table with 4 columns: (a) Line no., (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements. Contains 'N/A' entries.

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

Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship. Contains 'N/A' entries.

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. Signature of officer or trustee: TRUSTEE

Paid Preparer Use Only Preparer's name: DAVID C. CUNEO, Preparer's signature, Date, Check self-employed, PTIN: P00394891, Firm's name: CALEGARI & MORRIS, ACCOUNTANTS, Firm's EIN: ** - *** 6350, Firm's address: 650 CALIFORNIA ST. 3RD FLOOR SAN FRANCISCO, CA 94108, Phone no.: (415) 981-8766

Underpayment of Estimated Tax by Corporations

Attach to the corporation's tax return. FORM 990-PF

2024

Go to www.irs.gov/Form2220 for instructions and the latest information.

Name **MAY AND STANLEY SMITH CHARITABLE TRUST** Employer identification number ****-***2075**

Note: Generally, the corporation is not required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2, line 38, on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.

Part I Required Annual Payment			
1	Total tax (see instructions)	1	376,479.
2a	Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1	2a	
2b	Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method	2b	
2c	Credit for federal tax paid on fuels (see instructions)	2c	
2d	Total. Add lines 2a through 2c	2d	
3	Subtract line 2d from line 1. If the result is less than \$500, do not complete or file this form. The corporation does not owe the penalty	3	376,479.
4	Enter the tax shown on the corporation's 2023 income tax return. See instructions. Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5	4	321,521.
5	Required annual payment. Enter the smaller of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3	5	321,521.

Part II Reasons for Filing - Check the boxes below that apply. If any boxes are checked, the corporation **must** file Form 2220 even if it does not owe a penalty. See instructions.

- 6 The corporation is using the adjusted seasonal installment method.
- 7 The corporation is using the annualized income installment method.
- 8 The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

Part III Figuring the Underpayment		(a)	(b)	(c)	(d)
9	Installment due dates. Enter in columns (a) through (d) the 15th day of the 4th (Form 990-PF filers: Use 5th month), 6th, 9th, and 12th months of the corporation's tax year	05/15/24	06/15/24	09/15/24	12/15/24
10	Required installments. If the box on line 6 and/or line 7 above is checked, enter the amounts from Sch A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% (0.25) of line 5 above in each column				
11	Estimated tax paid or credited for each period. For column (a) only, enter the amount from line 11 on line 15. See instructions	100,958.	160,000.	100,000.	50,000.
Complete lines 12 through 18 of one column before going to the next column.					
12	Enter amount, if any, from line 18 of the preceding column		100,958.	260,958.	360,958.
13	Add lines 11 and 12		260,958.	360,958.	410,958.
14	Add amounts on lines 16 and 17 of the preceding column				
15	Subtract line 14 from line 13. If zero or less, enter -0-	100,958.	260,958.	360,958.	410,958.
16	If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-				
17	Underpayment. If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18				
18	Overpayment. If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column	100,958.	260,958.	360,958.	

Go to Part IV on page 2 to figure the penalty. Do not go to Part IV if there are no entries on line 17 - no penalty is owed.
For Paperwork Reduction Act Notice, see separate instructions. Form 2220 (2024)

Part IV Figuring the Penalty

	(a)	(b)	(c)	(d)
19 Enter the date of payment or the 15th day of the 4th month after the close of the tax year, whichever is earlier. (C corporations with tax years ending June 30 and S corporations: Use 3rd month instead of 4th month. Form 990-PF and Form 990-T filers: Use 5th month instead of 4th month.) See instructions	19			
20 Number of days from due date of installment on line 9 to the date shown on line 19	20			
21 Number of days on line 20 after 4/15/2024 and before 7/1/2024	21			
22 Underpayment on line 17 x $\frac{\text{Number of days on line 21} \times 8\% (0.08)}{366}$	22 \$	\$	\$	\$
23 Number of days on line 20 after 6/30/2024 and before 10/1/2024	23			
24 Underpayment on line 17 x $\frac{\text{Number of days on line 23} \times 8\% (0.08)}{366}$	24 \$	\$	\$	\$
25 Number of days on line 20 after 9/30/2024 and before 1/1/2025	25			
26 Underpayment on line 17 x $\frac{\text{Number of days on line 25} \times 8\% (0.08)}{366}$	26 \$	\$	\$	\$
27 Number of days on line 20 after 12/31/2024 and before 4/1/2025	27			
28 Underpayment on line 17 x $\frac{\text{Number of days on line 27} \times 7\% (0.07)}{365}$	28 \$	\$	\$	\$
29 Number of days on line 20 after 3/31/2025 and before 7/1/2025	29			
30 Underpayment on line 17 x $\frac{\text{Number of days on line 29} \times \%}{365}$	30 \$	\$	\$	\$
31 Number of days on line 20 after 6/30/2025 and before 10/1/2025	31			
32 Underpayment on line 17 x $\frac{\text{Number of days on line 31} \times \%}{365}$	32 \$	\$	\$	\$
33 Number of days on line 20 after 9/30/2025 and before 1/1/2026	33			
34 Underpayment on line 17 x $\frac{\text{Number of days on line 33} \times \%}{365}$	34 \$	\$	\$	\$
35 Number of days on line 20 after 12/31/2025 and before 3/16/2026	35			
36 Underpayment on line 17 x $\frac{\text{Number of days on line 35} \times \%}{365}$	36 \$	\$	\$	\$
37 Add lines 22, 24, 26, 28, 30, 32, 34, and 36	37 \$	\$	\$	\$
38 Penalty. Add columns (a) through (d) of line 37. Enter the total here and on Form 1120, line 34; or the comparable line for other income tax returns	38			\$ 0.

* Use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at www.irs.gov. You can also call 800-829-4933 to get interest rate information.

Schedule A Adjusted Seasonal Installment Method and Annualized Income Installment Method

See instructions.

Form 1120-S filers: For lines 1, 2, 3, and 21, "taxable income" refers to excess net passive income or the amount on which tax is imposed under section 1374(a), whichever applies.

Part I Adjusted Seasonal Installment Method

Caution: Use this method only if the base period percentage for any 6 consecutive months is at least 70%.
 See instructions.

		(a)	(b)	(c)	(d)
		First 3 months	First 5 months	First 8 months	First 11 months
1 Enter taxable income for the following periods.					
a Tax year beginning in 2021	1a				
b Tax year beginning in 2022	1b				
c Tax year beginning in 2023	1c				
2 Enter taxable income for each period for the tax year beginning in 2024. See the instructions for the treatment of extraordinary items	2				
3 Enter taxable income for the following periods.		First 4 months	First 6 months	First 9 months	Entire year
a Tax year beginning in 2021	3a				
b Tax year beginning in 2022	3b				
c Tax year beginning in 2023	3c				
4 Divide the amount in each column on line 1a by the amount in column (d) on line 3a	4				
5 Divide the amount in each column on line 1b by the amount in column (d) on line 3b	5				
6 Divide the amount in each column on line 1c by the amount in column (d) on line 3c	6				
7 Add lines 4 through 6	7				
8 Divide line 7 by 3.0	8				
9a Divide line 2 by line 8	9a				
b Extraordinary items (see instructions)	9b				
c Add lines 9a and 9b	9c				
10 Figure the tax on the amt on ln 9c using the instr for Form 1120, Sch J, line 1, or comparable line of corp's return ...	10				
11a Divide the amount in columns (a) through (c) on line 3a by the amount in column (d) on line 3a	11a				
b Divide the amount in columns (a) through (c) on line 3b by the amount in column (d) on line 3b	11b				
c Divide the amount in columns (a) through (c) on line 3c by the amount in column (d) on line 3c	11c				
12 Add lines 11a through 11c	12				
13 Divide line 12 by 3.0	13				
14 Multiply the amount in columns (a) through (c) of line 10 by columns (a) through (c) of line 13. In column (d), enter the amount from line 10, column (d)	14				
15 Enter any alternative minimum tax for each payment period. See instructions	15				
16 Enter any other taxes for each payment period. See instr.	16				
17 Add lines 14 through 16	17				
18 For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions	18				
19 Total tax after credits. Subtract line 18 from line 17. If zero or less, enter -0-	19				

Part II Annualized Income Installment Method

		(a)	(b)	(c)	(d)
		First <u>2</u> months	First <u>3</u> months	First <u>6</u> months	First <u>9</u> months
20	Annualization periods (see instructions)				
21	Enter taxable income for each annualization period. See instructions for the treatment of extraordinary items				
22	Annualization amounts (see instructions)	6.000000	4.000000	2.000000	1.333330
23a	Annualized taxable income. Multiply line 21 by line 22				
23b	Extraordinary items (see instructions)				
23c	Add lines 23a and 23b				
24	Figure the tax on the amount on line 23c using the instructions for Form 1120, Schedule J, line 1, or comparable line of corporation's return				
25	Enter any alternative minimum tax for each payment period. See instructions				
26	Enter any other taxes for each payment period. See instr.				
27	Total tax. Add lines 24 through 26				
28	For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions				
29	Total tax after credits. Subtract line 28 from line 27. If zero or less, enter -0-				
30	Applicable percentage	25%	50%	75%	100%
31	Multiply line 29 by line 30				

Part III Required Installments

		1st	2nd	3rd	4th
		installment	installment	installment	installment
Note: Complete lines 32 through 38 of one column before completing the next column.					
32	If only Part I or Part II is completed, enter the amount in each column from line 19 or line 31. If both parts are completed, enter the smaller of the amounts in each column from line 19 or line 31	0.	0.	0.	0.
33	Add the amounts in all preceding columns of line 32. See instructions				
34	Adjusted seasonal or annualized income installments. Subtract line 33 from line 32. If zero or less, enter -0-				
35	Enter 25% (0.25) of line 5 on page 1 of Form 2220 in each column. Note: "Large corporations," see the instructions for line 10 for the amounts to enter	80,380.	107,859.	94,120.	94,120.
36	Subtract line 38 of the preceding column from line 37 of the preceding column		80,380.	188,239.	282,359.
37	Add lines 35 and 36	80,380.	188,239.	282,359.	376,479.
38	Required installments. Enter the smaller of line 34 or line 37 here and on page 1 of Form 2220, line 10. See instructions	0.	0.	0.	0.

Form 2220 (2024)

**** ANNUALIZED INCOME INSTALLMENT METHOD USING STANDARD OPTION**

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES			STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BROKERAGE ACCOUNTS - DIVIDENDS	10,132,627.	0.	10,132,627.	8,776,393.	
BROKERAGE ACCOUNTS - INTEREST	5,490.	0.	5,490.	5,490.	
MARCH CAPITAL FUND III	55,337.	0.	55,337.	55,337.	
MARCH CAPITAL FUND IV	11,661.	0.	11,661.	11,661.	
NYCA INVESTMENT FUND IV-A LP - INTEREST	29,005.	0.	29,005.	29,005.	
RENTAL REAL ESTATE LOSS - MARCH CAPITAL OPP FUND	-96,428.	0.	-96,428.	-96,428.	
RENTAL REAL ESTATE LOSS - VIRTU JV OPP FUND LP	-303,171.	0.	-303,171.	-303,171.	
RISE FUND III	897.	0.	897.	897.	
RISE FUND III CAYFIR AIV II LP	5,875.	0.	5,875.	5,875.	
RISE FUND III CAYMAN AIV II LP - DIVIDENDS	45,884.	0.	45,884.	0.	
RISE FUND III DE AIV II LP	4,361.	0.	4,361.	4,361.	
SFF REALITY FUND III	34,164.	0.	34,164.	34,164.	
SFF REALITY FUND IV	15,959.	0.	15,959.	15,959.	
SFF REALTY FUND II	706,769.	0.	706,769.	706,769.	
VIRTU JV OPP FUND	1,755.	0.	1,755.	1,755.	
TO PART I, LINE 4	10,650,185.	0.	10,650,185.	9,248,067.	

FORM 990-PF	OTHER INCOME		STATEMENT	2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
RISE FUND III CAYMAN AIV II LP	80,940.	80,940.		
RISE FUND III CAYFIR AIV II LP	476.	476.		
RISE FUND III DE AIV II LP	30,991.	30,991.		
OTHER INCOME	38,443.	38,443.		
RISE FUND III LP	149.	149.		
RENTAL REAL ESTATE INCOME - MARCH CAPITAL OPP FUND IV	12,909.	12,909.		
TOTAL TO FORM 990-PF, PART I, LINE 11	163,908.	163,908.		

FORM 990-PF	LEGAL FEES		STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	16,925.			17,875.
TO FM 990-PF, PG 1, LN 16A	16,925.			17,875.

FORM 990-PF	ACCOUNTING FEES		STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	84,152.			42,076.
ACCOUNTING FEES	55,801.			27,901.
ACCOUNTING FEES	29,602.			15,487.
TO FORM 990-PF, PG 1, LN 16B	169,555.			85,464.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
CONSULTANT FEES	137,838.			126,852.	
INVESTMENT FEES	2,236,881.			0.	
TO FORM 990-PF, PG 1, LN 16C	2,374,719.			126,852.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL EXCISE TAX_FEDERAL UBTI	384,126.			0.	
FOREIGN TAXES	129,024.			0.	
OTHER TAXES	269.			269.	
TO FORM 990-PF, PG 1, LN 18	513,419.			269.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
COST OF SALES (BOOKS)	107.			0.	
CHARITABLE CONTRIBUTIONS (FROM PARTNERSHIPS)	1,352.			1,352.	
EQUIPMENT	10,968.			10,953.	
INVESTMENT EXPENSE (FROM PARTNERSHIPS)	1,201,358.			0.	
INVESTMENT INTEREST EXPENSE (FROM PARTNERSHIPS)	198,811.			0.	
INSURANCE	4,398.			3,565.	
MEMBERSHIPS	10,676.			10,662.	
OFFICE EXPENSE	3,572.			5,234.	
SUBSCRIPTION SERVICES	66,289.			67,909.	
TELECOMMUNICATIONS	11,814.			13,200.	
UTILITIES	6,095.			5,956.	
WORKERS COMPENSATION	2,092.			2,092.	
OTHER INVESTMENT EXPENSES (BOOK ONLY)	1,085,741.			0.	

K-1S UBTI LOSS	1,347,005.	0.
TO FORM 990-PF, PG 1, LN 23	3,950,278.	120,923.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
UNREALIZED GAINS AND UNREALIZED FOREIGN CURRENCY ADJUSTMENTS	29,164,246.
TOTAL TO FORM 990-PF, PART III, LINE 3	29,164,246.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	251,790,210.	251,790,210.
TOTAL TO FORM 990-PF, PART II, LINE 10B	251,790,210.	251,790,210.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS (US)	86,590,999.	86,590,999.
TOTAL TO FORM 990-PF, PART II, LINE 10C	86,590,999.	86,590,999.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SFF REALTY FUND II, III, IV	FMV	19,879,115.	19,879,115.
MARCH CAPITAL OPPORTUNITY FUND III	FMV	7,562,816.	7,562,816.
MARCH CAPITAL OPPORTUNITY FUND IV	FMV	9,717,362.	9,717,362.
NYCA INVESTMENT FUND IV-A	FMV	7,908,158.	7,908,158.
CRYSTAL CAPITAL INTERNATIONAL FUND SPC	FMV	32,560,128.	32,560,128.
TPG RISE FUND III	FMV	7,511,591.	7,511,591.

VIRTU JOINT VENTURE OPPORTUNITY	FMV		
FUND LP		10,000,000.	10,000,000.
CSF IV LP	FMV	461,887.	461,887.
TOTAL TO FORM 990-PF, PART II, LINE 13		<u>95,601,057.</u>	<u>95,601,057.</u>

FORM 990-PF

EXPENDITURE RESPONSIBILITY STATEMENT
PART VI-B, LINE 5D

STATEMENT 12

GRANTEE'S NAME

MAY WONG SMITH TRUST C/O SCHOOL OF ECONOMICS & FINANCE, UNIV OF ST ANDREWS

GRANTEE'S ADDRESSCASTLECLIFFE
SAINT ANDREWS FIFE, SCOTLAND, UNITED KINGDOM, KY16 9AJ

<u>GRANT AMOUNT</u>	<u>DATE OF GRANT</u>	<u>AMOUNT EXPENDED</u>
300,000.	11/04/11	8,357.

PURPOSE OF GRANT

TO ESTABLISH A PERMANENT ENDOWMENT FUND TO FURTHER THE MISSION OF THE MAY WONG SMITH TRUST: ESTABLISHING AND MAINTAINING ST. LEONARD'S COLLEGE AS PART OF THE UNIVERSITY OF ST. ANDREWS, AND PROVIDING FELLOWSHIPS, SCHOLARSHIPS, AND PRIZES TO STUDENTS IN THE UNIVERSITY OF ST. ANDREWS, ASSISTING SUCH STUDENTS FINANCIALLY AND GENERALLY LOOKING AFTER THEIR WELFARE.

DATES OF REPORTS BY GRANTEE

12/16/2024 ANNUAL ER REPORT

ANY DIVERSION BY GRANTEE

NO PART HAS BEEN USED FOR OTHER THAN ITS INTENDED PURPOSE

RESULTS OF VERIFICATION

THE FOUNDATION REVIEWED THE GRANT REPORT OF 12/16/2024 BUT DID NOT UNDERTAKE ANY VERIFICATION OF THE GRANTEE'S REPORT AS THERE HAS NOT BEEN ANY REASON TO DOUBT ITS ACCURACY OR RELIABILITY (REG. 53.4945-5(C)).

GENERAL EXPLANATION

STATEMENT 14

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

PARTS VI-B AND VII - 2024 RELATED PARTY FOOTNOTE:

EXPLANATION:

A TRUSTEE OF THE TRUST IS AN OFFICER IN THE COMPANY THAT PROVIDES TAX RETURN PREPARATION SERVICES TO THE TRUST. THE COMPANY WAS PAID \$29,602 IN 2024.

THE TRUST PROVIDES ADMINISTRATIVE SERVICES TO ANOTHER RELATED PARTY TRUST WHICH SHARES ONE TRUSTEE WITH THE TRUST.

THE PAYMENT OF COMPENSATION TO THIS DISQUALIFIED PERSON FOR PERSONAL SERVICES IS REASONABLE AND NECESSARY IN CARRYING OUT THE EXEMPT PURPOSE OF THE PRIVATE FOUNDATION AND ARE NOT CONSIDERED ACTS OF SELF DEALING.

May and Stanley Smith Charitable Trust

94-6622075

Form 990-PF - Part XIV Line 3 Grants and Contributions Paid During the Year or Approved for Future Payment

For Year Ended December 31, 2024

3a. Paid during the year

Recipient Name and Address	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 Paid in 2024
A Home Within Inc. Oakland, CA	N/A	PC	To provide high-quality, consistent, long-term mental health support for foster youth	\$110,000
A Sanctuary For Military Families Inc. Pagosa Springs, CO	N/A	PC	To provide therapeutic retreats and support for military families.	\$75,000
Advancement Through Opportunity and Knowledge Incorporated Los Angeles, CA	N/A	PC	To support foster youth to graduate high school and succeed in post-secondary education	\$75,000
Affordable Living for the Aging West Hollywood, CA	N/A	PC	To provide low-income older adults with supportive housing and home-sharing options	\$65,000
Age UK East London London United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To support older adults in East London to age safely in community	\$50,000
Age US Clackamas, OR	N/A	PC	To support multi-sector plan for aging planning and development in Oregon	\$20,000
Alliance For Childrens Rights Los Angeles, CA	N/A	PC	To ensure L.A.'s foster youth have access to stable homes, health care, and education	\$125,000
America's Warrior Partnership Inc. Augusta, GA	N/A	PC	To provide veteran supportive services in Navajo Nation and Alaska	\$50,000
Another Chance House Amarillo, TX	N/A	PC	To provide housing and supportive services to homeless veterans in the Texas panhandle	\$40,000
Arc California Sacramento, CA	N/A	PC	To advocate for and protect the human rights of people with intellectual and developmental disabilities and support their full inclusion in the community	\$175,000
Association of Small Foundations Washington, DC	N/A	PC	2024 Membership Dues	\$1,000
Autistic Self Advocacy Network Washington, DC	N/A	PC	To ensure access, rights, and opportunities for Autistic people through education, community organization, and self-advocacy	\$75,000
Banner Alzheimer's Foundation Phoenix, AZ	N/A	PC	To provide culturally competent caregiving tools that serve Native tribal communities	\$100,000
Bay Area Legal Aid Oakland, CA	N/A	PC	To provide civil legal assistance to homeless and former foster youth	\$150,000

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Bay Area Outreach and Recreation Program Berkeley, CA	N/A	PC	To support BORP staff's participation in Listen4Good capacity-building program	\$10,000
Bay Area Outreach and Recreation Program Berkeley, CA	N/A	PC	To provide sports, recreation, and outdoor adventures to individuals with disabilities	\$45,000
BC Aboriginal Network on Disability Society Victoria, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide direct services, resources, and advocacy for Indigenous person living with disabilities in British Columbia.	\$100,000
Best Buddies International Inc. Miami, FL	N/A	PC	To provide transitioning young adults with IDD an opportunity to develop and practice workplace readiness skills essential to workforce success	\$150,000
Bet Tzedek Los Angeles, CA	N/A	PC	To provide free legal services to low-income adults with IDD and their families/caregivers in the LA area	\$75,000
Beyond Emancipation Oakland, CA	N/A	PC	To support foster youth as they transition to adulthood	\$75,000
Big Brothers Big Sisters of San Diego County Inc. San Diego, CA	N/A	PC	To provide mentoring support for military children in the San Diego area	\$75,000
Blue Star Families Inc. Encinitas, CA	N/A	PC	To provide community connection and support to military families	\$50,000
Blue Star Recyclers Colorado Springs, CO	N/A	PC	To promote inclusive and competitive employment in the electronics recycling, distribution, and manufacturing industries for adults with autism and IDD	\$100,000
BoardSource Washington, DC	N/A	PC	2024 Membership Dues	\$3,500
California Youth Connection Oakland, CA	N/A	PC	To develop foster youths' leadership and advocacy skills	\$125,000
Camp For All Foundation Houston, TX	N/A	PC	To support the expansion of a second barrier-free camp location for adults and transitioning youth with disabilities	\$150,000
Camp For All Foundation Houston, TX	N/A	PC	To provide a barrier-free camp experience for adults and transitioning youth with disabilities	\$50,000
Candid New York, NY	N/A	PC	2024 Membership Dues	\$19,621
Caregivers Volunteers Assisting the Elderly Ventura, CA	N/A	PC	To provide trained volunteer support that enables homebound elders to live independently	\$75,000
Caring Across Generations New York, NY	N/A	PC	To advance state and federal policies that support caregivers across the lifespan	\$250,000

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CASA of Los Angeles Monterey Park, CA	N/A	PC	To provide foster youth with trained volunteers who serve as advocates and mentors	\$50,000
Catholic Charities Of The Archdiocese Of Galveston-Houston Houston, TX	N/A	PC	To provide counseling, career support, housing, and other assistance to homeless women veterans in the Houston area	\$100,000
Catholic Community Services Of Southern Arizona Inc. Tucson, AZ	N/A	PC	To provide comprehensive services and support for transitioning youth and adults who are Deaf, DeafBlind, or Deaf-disabled	\$100,000
Center for Health Care Strategies Inc. Hamilton, NJ	N/A	PC	To support multi-state learning collaboratives for development of MPAs	\$150,000
Center for Innovation Inc. Linthicum, MD	N/A	PC	To deinstitutionalize long-term care and advance a person-centered approach in elder care	\$200,000
Center for Pursuit Houston, TX	N/A	PC	To provide lifelong supports in a community setting that build independence, workforce, and self-advocacy skills	\$75,000
Channel Islands Young Men's Christian Association Carpinteria, CA	N/A	PC	To provide comprehensive services to foster and homeless youth	\$35,000
Children and Youth Justice Center Seattle, WA	N/A	PC	To support foster, homeless, and juvenile justice-involved youth in Washington State	\$50,000
Children Now Oakland, CA	N/A	PC	To support policies and practices that enhance child well-being	\$100,000
Children's Rights Inc. New York, NY	N/A	PC	To ensure youth are safe and supported when in out-of-home care	\$125,000
Churchie Foundation Limited East Brisbane Australia	N/A	NC (Foreign Public Charity Equivalent)	To provide scholarships and financial aid to students at Anglican Church Grammar School	\$125,000
Coastal Roots Farm Encinitas, CA	N/A	PC	To nourish older adults with organic foods and foster intergenerational connections	\$75,000
Colorado Association of Area Agencies on Aging Fort Collins, CO	N/A	PC	To support multi-sector plan for aging planning and development in Colorado	\$20,000
Colorado State University Foundation Fort Collins, CO	N/A	PC	To provide college transition and academic support for students with autism or brain injuries	\$50,000
Columbus Foundation Inc. Salt Lake City, UT	N/A	PC	To provide employment-related training and independent living services to young adults with Autism Spectrum Disorder (ASD)	\$55,000
Community Entry Services Inc. Riverton, WY	N/A	PC	To provide comprehensive services and supports for adults with disabilities in Wyoming	\$90,000
Community Living Campaign San Francisco, CA	N/A	PC	To support and empower older adults to plan for their care needs to safely age in place	\$100,000

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Community Solutions International Inc. New York, NY	N/A	PC	To provide capacity building for communities to address veteran homelessness in the western U.S.	\$100,000
Contra Costa Senior Legal Services Concord, CA	N/A	PC	To provide legal assistance to older adults with disabilities or experiencing poverty	\$70,000
Corporation for Supportive Housing Los Angeles, CA	N/A	PC	To advance policies benefitting homeless or unnecessarily institutionalized elders	\$250,000
Council on Criminal Justice Inc. Washington, DC	N/A	PC	To decrease the number of incarcerated veterans through advocacy efforts to reform the criminal justice system, community policing, and how veterans transition into communities	\$100,000
Council on Foundations Inc. Philadelphia, PA	N/A	PC	2024 Membership Dues	\$19,000
Council On Quality & Leadership In Supports For People With Disabilities Towson, MD	N/A	PC	To provide leadership training and support for emerging nonprofit leaders of organizations serving adults with IDD	\$130,000
Court Appointed Special Advocates Of Travis County Austin, TX	N/A	PC	To support Travis County youth transitioning out of the foster care system	\$50,000
Covenant House Alaska Anchorage, AK	N/A	PC	To support Alaska's youth who are homeless or at risk of homelessness	\$125,000
Creative Growth Inc. Oakland, CA	N/A	PC	To strengthen professional opportunities and advance the inclusion of artists with developmental disabilities in contemporary art	\$50,000
Depaul UK London United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To provide emergency, transitional housing, and support services to at-risk youth in London	\$100,000
Diocese of Southeast Florida Inc Christ Episcopal Church Miami, FL	N/A	PC	To support social outreach activities to disadvantaged children and adults in Nassau, Bahamas	\$30,000
Disability Belongs Fredericksburg, VA	N/A	PC	To promote, educate, and advance policies and practices that advocate for full inclusion of individuals with disabilities	\$150,000
Downtown Women's Center Los Angeles, CA	N/A	PC	To provide homeless prevention, rapid rehousing, and case management support to low-income and homeless women veterans in Los Angeles	\$100,000
Duet Partners In Health & Aging Inc. Phoenix, AZ	N/A	PC	To provide volunteer-assisted programming to support homebound elders, caregivers, and grandfamilies	\$60,000

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Ebenezer School and Home for the Visually Impaired Ltd. Pokfulam Hong Kong	N/A	NC (Foreign Public Charity Equivalent)	To provide swimming and braille translation programs for visually impaired children	\$30,000
Ecumenical Center for Religion and Health San Antonio, TX	N/A	PC	To provide mental health services to older adults in rural communities in central/south Texas	\$75,000
Ecumenical Center for Religion and Health San Antonio, TX	N/A	PC	To provide mental health services to older adults in rural communities in south Texas	\$70,000
Empowered Aging Pleasant Hill, CA	N/A	PC	To support the Elder Justice program in investigating elder abuse and supporting victims of abuse across Solano County	\$100,000
Empowered Aging Pleasant Hill, CA	N/A	PC	To support workforce development of direct care workers, quality care for residents of long-term care facilities and to prevent abuse of older adults across three counties	\$80,000
Family Builders By Adoption Alameda, CA	N/A	PC	To support foster/adoptive families and youth in the Bay Area	\$50,000
Family Caregiver Alliance San Francisco, CA	N/A	PC	To provide comprehensive information, training, and support to family caregivers	\$70,000
Family Eldercare Inc. Austin, TX	N/A	PC	To help vulnerable elders to age in place through access to coordinated supportive services	\$125,000
Farmer Veteran Coalition Dallas, TX	N/A	PC	To support veterans in agriculture with resources and mentoring	\$100,000
First Place for Youth Oakland, CA	N/A	PC	To provide housing and wraparound services to youth transitioning from foster care	\$125,000
Food For Thought Forestville, CA	N/A	PC	To provide nutritious, medically tailored meals and food assistance for low-income elders	\$65,000
Foster Forward East Providence, RI	N/A	PC	2024 Membership Dues	\$5,000
Fosterclub Seaside, OR	N/A	PC	To connect current and former foster youth to resources and support foster youth leaders to advocate for policy change	\$125,000
Fostering Media Connections Los Angeles, CA	N/A	PC	To deepen understanding of child welfare, youth justice, and youth homelessness issues	\$75,000
Freedom Fwd San Francisco, CA	N/A	PC	To support youth who are sex trafficking survivors and other vulnerable youth	\$50,000

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Friends for Life Waco, TX	N/A	PC	To provide direct services, care coordination, money management, and advocacy that support individuals with disabilities to live independently for as long as possible	\$50,000
Friends of the Children - National Office Portland, OR	N/A	PC	To provide long-term one-on-one mentoring and support to at-risk youth and their families	\$100,000
Funders for Lesbian and Gay Issues Inc. New York, NY	N/A	PC	Sponsorship for 2024 Pride in Philanthropy Awards	\$2,500
Funders for Lesbian and Gay Issues Inc. New York, NY	N/A	PC	2024 Membership Dues	\$2,500
Funders Together to End Homelessness Inc Boston, MA	N/A	PC	2024 Membership Dues	\$3,000
Generations United Inc. Washington, DC	N/A	PC	To provide tools and resources to promote the importance of intergenerational connection	\$200,000
Grantmakers In Aging Inc. White Plains, NY	N/A	PC	To support the 2024 conference and housing workgroup	\$10,000
Grantmakers In Aging Inc. White Plains, NY	N/A	PC	2024 Membership Dues	\$5,500
Great Plains Veteran Services Center Box Elder, MT	N/A	PC	To provide support for veterans in North Central Montana	\$50,000
Greater Horizons Kansas City, MO	N/A	PC	To support a pooled fund which distributes grants to programs that promote educational success for foster youth	\$100,000
Groundworks New Mexico Albuquerque, NM	N/A	PC	2024 Membership Dues	\$1,500
Head Strong Project Inc. Flushing, NY	N/A	PC	To provide mental health care to veterans in the Western U.S.	\$200,000
Hearing Speech & Deafness Center Seattle, WA	N/A	PC	To support an internship/mentorship program that provides training and experience to ASL interpreters	\$40,000
Heart & Soul Salt Lake City, UT	N/A	PC	To improve quality of life for elders in long-term care through high quality live entertainment	\$50,000
Highline College Foundation Des Moines, WA	N/A	PC	To provide an inclusive college-based certificate program that allows transitioning youth with disabilities to identify and obtain employment	\$50,000
Hire Heroes USA Alpharetta, GA	N/A	PC	To provide career services to transitioning service members, veterans, and military spouses that empower them to succeed in the civilian workforce	\$200,000

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Home Front Military Network Colorado Springs, CO	N/A	PC	To provide resource navigation and assistance for veterans living in Colorado	\$50,000
Homeless Youth Alliance Inc. San Francisco, CA	N/A	PC	To provide supportive services to homeless youth in San Francisco	\$50,000
Homes for Families Woodland Hills, CA	N/A	PC	To provide supportive services for low-income and housing unstable veterans and families transitioning into permanent housing	\$50,000
Homeward Bound of Marin Novato, CA	N/A	PC	To provide housing and employment services to homeless veterans in Marin County	\$100,000
Imagine Los Angeles Inc. Los Angeles, CA	N/A	PC	To help individuals and families understand and navigate local, state, and federal benefits	\$100,000
Immigrant Legal Resource Center San Francisco, CA	N/A	PC	To support immigrant children and families involved in, or eligible for, child welfare services	\$50,000
INCIGHT Company Portland, OR	N/A	PC	To support transitional education, independent living skills building, and workforce development for individuals with disabilities	\$50,000
Inclusion BC Society New Westminster, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To be the convener, conduit, and collective public voice for local community agencies serving people with IDD across British Columbia	\$75,000
Inner City Law Center Los Angeles, CA	N/A	PC	To provide free legal services to homeless, low-income veterans in Los Angeles	\$100,000
Institute On Aging San Francisco, CA	N/A	PC	To provide necessary supports and services to assist in caregiving and well-being of elders	\$100,000
Interfaith CarePartners Inc. Houston, TX	N/A	PC	To provide social events and activities for elders with dementia, and respite for caregivers	\$40,000
Interfaith Community Services Inc. Escondido, CA	N/A	PC	To provide mental health and homeless services for veterans experiencing homelessness in San Diego County.	\$125,000
International Documentary Association Los Angeles, CA	N/A	PC	To document the rise of youth advocates with lived experience in foster care	\$40,000
Jewish Family Service Agency of Vancouver Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide care management and comprehensive supports to elders and their families	\$95,000

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Jewish Family Service Houston, TX	N/A	PC	To provide life skills, vocational training, and supported employment opportunities to adults with disabilities and education to the broader community	\$150,000
John Burton Advocates for Youth San Francisco, CA	N/A	PC	To support the 2024 Blueprint for Foster Youth College & Career Success Conference	\$10,000
John Burton Advocates for Youth San Francisco, CA	N/A	PC	To ensure California's foster and homeless youth have access to education, housing, and economic security	\$110,000
Jumping Mouse Childrens Center Port Townsend, WA	N/A	PC	To provide therapy to at-risk children and support for their caregivers	\$50,000
Just in Time for Foster Youth San Diego, CA	N/A	PC	To support foster youth to become independent and self-sufficient	\$75,000
Justice In Aging Oakland, CA	N/A	PC	To improve systems used by elders and the disabled through training, innovation, and litigation	\$225,000
Kindering Center Bellevue, WA	N/A	PC	To support the social and emotional development of infants and toddlers in foster care	\$80,000
La Plaza De Encuentro Gathering Place Albuquerque, NM	N/A	PC	To provide training to a culturally competent Spanish speaking direct care workforce	\$100,000
Lanakila Pacific Honolulu, HI	N/A	PC	To provide services and supports for adults with disabilities that enhance employment opportunities, build independence, and inspire inclusive communities	\$65,000
Larkin Street Youth Services San Francisco, CA	N/A	PC	To support homeless youth and youth at-risk of homelessness in San Francisco	\$150,000
Law College Association of the University of Arizona Tucson, AZ	N/A	PC	To provide pro bono legal services for veterans through veteran treatment courts in Arizona	\$60,000
Law Foundation of Silicon Valley San Jose, CA	N/A	PC	To provide legal education and free civil legal services for transition-age foster youth	\$80,000
Legal Services For Children Inc. San Francisco, CA	N/A	PC	To provide free legal representation and social work services to children and youth	\$175,000
LifeMoves Santa Clara, CA	N/A	PC	To provide homelessness services to veteran families in San Mateo and Santa Clara Counties	\$90,000
Lifetime Arts Pelham, NY	N/A	PC	To engage elders through arts programming in partnership with public sector partners	\$225,000

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Lighthouse for the Blind Inc. Seattle, WA	N/A	PC	To promote workplace advancement and full participation in the community for adults who are DeafBlind	\$40,000
Living Independence Network Corp Boise, ID	N/A	PC	To support an accessible driving training advocacy campaign in Idaho	\$50,000
Los Angeles LGBT Center Los Angeles, CA	N/A	PC	To provide supportive services to LGBT older adults living in Los Angeles County	\$175,000
Lyford Cay Foundation Inc. Greenwich, CT	N/A	PC	To prepare low-income Bahamian students for high school graduation and post-secondary or career technical education	\$100,000
Marbridge Foundation Inc. Manchaca, TX	N/A	PC	To provide individualized residential services, training, and education to adults with disabilities across their lifespan	\$100,000
Marbridge Foundation Inc. Manchaca, TX	N/A	PC	To provide individualized residential services, training, and education to adults with disabilities across their lifespan	\$50,000
Marbridge Foundation Inc. Manchaca, TX	N/A	PC	To support the CoACT Project Leadership Symposium	\$5,000
Marin Brain Injury Network Larkspur, CA	N/A	PC	To provide a continuum of care for individuals with acquired brain injuries and their families	\$40,000
Marin Humane Society Novato, CA	N/A	PC	To improve the health and quality of life of low-income seniors through pet care support	\$40,000
Meals on Wheels Diablo Region Walnut Creek, CA	N/A	PC	To provide community engagement, fall prevention, and care management services to older adults	\$80,000
Mental Health America of Greater Houston Inc. Houston, TX	N/A	PC	To provide peer support, mentorship, and resource referrals for veterans in the greater Houston area	\$100,000
Military Child Education Coalition Harker Heights, TX	N/A	PC	To support the education of military children worldwide	\$100,000
Missoula Area Agency on Aging Missoula, MT	N/A	PC	To provide critical direct services that support elders to safely age in place	\$65,000
Mockingbird Society Seattle, WA	N/A	PC	To provide leadership development and advocacy training to foster and homeless youth	\$100,000
Move United Rockville, MD	N/A	PC	To encourage low-income young adults with disabilities to engage in sports in their communities	\$120,000
Mt. Carmel Veterans Service Center Colorado Springs, CO	N/A	PC	To support service members, veterans, and their families in Southern Colorado	\$100,000

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My Possibilities Plano, TX	N/A	PC	To provide comprehensive continued education and employment services that empower individuals with IDD to reach their full potential	\$75,000
Mychals Learning Place Hawthorne, CA	N/A	PC	To provide independent living skills and job training for young adults with intellectual and developmental disabilities	\$50,000
Mychals Learning Place Hawthorne, CA	N/A	PC	To support the expansion of the café social enterprise and increase training and workforce opportunities for young adults with IDD	\$150,000
Na Hoaloha-Maui Interfaith Volunteer Caregivers Wailuku, HI	N/A	PC	To provide trained volunteer support that enables homebound elders to live independently	\$70,000
National Ability Center Park City, UT	N/A	PC	To provide sports, recreation, and educational programs for adults, families, and friends affected by a disability	\$75,000
National Coalition for Homeless Veterans Washington, DC	N/A	PC	To sponsor the National Coalition for Homeless Veterans' National Conference bringing together over 750 advocates, practitioners, and policy makers for three-days of education, collaboration, and community building.	\$10,000
National Coalition for Homeless Veterans Washington, DC	N/A	PC	2024 Membership Dues	\$1,000
National Committee for Responsive Philanthropy Washington, DC	N/A	PC	2024 Membership Dues	\$7,500
National Disability Institute Inc. Washington, DC	N/A	PC	To advocate and build a better economic future for people with disabilities	\$125,000
National Low Income Housing Coalition Washington, DC	N/A	PC	To prevent evictions and ensure housing stability for low-income households	\$150,000
National Veterans Legal Services Program Inc. Alexandria, VA	N/A	PC	To provide legal assistance to veterans seeking VA benefits and discharge upgrades	\$75,000
Nevada Rural Counties RSVP Program Inc. Carson City, NV	N/A	PC	To support elders and caregivers to meet basic needs and facilitate older adult volunteerism	\$60,000
New Avenues for Youth Inc. Portland, OR	N/A	PC	To support youth who are experiencing or at risk of homelessness	\$100,000
New Directions Inc. Los Angeles, CA	N/A	PC	To provide transitional housing, behavioral health services, and homeless services for veterans	\$150,000
New Mexico Child Advocacy Networks Albuquerque, NM	N/A	PC	To support youth impacted by foster care, homelessness, or the juvenile justice system	\$75,000

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NextOp Inc. Houston, TX	N/A	PC	To provide employment support to transitioning veterans in the Gulf Coast region	\$75,000
Northern California Grantmakers San Francisco, CA	N/A	PC	To support the 2024 annual conference of Northern California Grantmakers, Imagine and Act	\$10,000
Northern California Grantmakers San Francisco, CA	N/A	PC	2024 Membership Dues	\$11,250
Northwest Justice Project Seattle, WA	N/A	PC	To provide legal services to low-income veterans in Washington State	\$110,000
NPower Inc. Brooklyn, NY	N/A	PC	To provide information technology training and career support to veterans in Texas and California	\$100,000
On Lok Day Services San Francisco, CA	N/A	PC	To provide culturally sensitive wellness programs, healthy meals, and case management	\$75,000
On The Move Napa, CA	N/A	PC	To support foster youth to successfully transition into adulthood	\$100,000
Openhouse San Francisco, CA	N/A	PC	To provide inclusive housing and supportive services for LGBT elders to age safely in place	\$140,000
Operation Homefront Inc. San Antonio, TX	N/A	PC	To provide stable transitional housing and support for wounded, ill, and injured veterans and their families	\$100,000
Outdoors For All Foundation Bellevue, WA	N/A	PC	To enrich the quality of life for adults and transitioning youth with disabilities through outdoor recreation	\$50,000
PEAK Grantmaking, Inc. Washington, DC	N/A	PC	To support the 2023 PEAK Grantmaking Volunteer Leadership Summit	\$10,000
PEAK Grantmaking, Inc. Washington, DC	N/A	PC	2024 PEAK Convening Sponsorship	\$10,000
PEAK Grantmaking, Inc. Washington, DC	N/A	PC	2024 Membership Dues	\$4,250
Philanthropy Northwest Seattle, WA	N/A	PC	To support the 2024 Philanthropy Northwest Conference	\$2,500
Philanthropy Northwest Seattle, WA	N/A	PC	2024 Membership Dues	\$5,405
Philanthropy Southwest Dallas, TX	N/A	PC	2024 Membership Dues	\$6,600
Plan Institute for Citizenship & Disability Burnaby, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To empower people with disabilities to live fully engaged lives through educational initiatives, community-based projects, and advocating for policy reform	\$100,000

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Power To Be Adventure Therapy Society Victoria, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To advocate and provide inclusive adaptive recreation programming for adults with disabilities	\$80,000
PsychArmor Institute Inc. San Diego, CA	N/A	PC	To provide free training programs that support those serving veterans	\$50,000
Public Counsel Los Angeles, CA	N/A	PC	To provide legal services for foster and guardianship youth and families in Los Angeles	\$150,000
Raise The Future Denver, CO	N/A	PC	To support the adoption of hard to place foster youth	\$100,000
Recovery Resource Council Fort Worth, TX	N/A	PC	To provide mental health care for service members, veterans, and their families in North Texas	\$100,000
Regents of the University of Michigan Ann Arbor, MI	N/A	PC	To support expansion of the Peer Advisors for Veterans Education in the Western U.S.	\$200,000
Returning Veterans Project Portland, OR	N/A	PC	To provide access to free, confidential therapeutic services for veterans and their families	\$35,000
RightWay Foundation Los Angeles, CA	N/A	PC	To provide employment support, housing, and trauma-informed mental health services for foster youth	\$50,000
Roman Catholic Archdiocese of Nassau Bahamas Foundation Coral Gables, FL	N/A	SO I	To provide educational opportunities for students with disabilities	\$40,000
Safe & Sound San Francisco, CA	N/A	PC	To prevent child abuse and support vulnerable families to become healthy and stable	\$175,000
Salvation Army World Service Office SAWSO Alexandria, VA	N/A	SO I	To provide individualized instruction and skills training to students with visual impairments	\$35,000
Sanctuary of Hope Los Angeles, CA	N/A	PC	To provide comprehensive support services to transition-age youth in South Los Angeles	\$50,000
Seniors' Resource Center Inc. Denver, CO	N/A	PC	To provide care management and comprehensive support services to elders and their families	\$65,000
Seniors Services Society of BC New Westminster, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide housing to homeless elders and services to support seniors to age in place	\$70,000
Serving Seniors San Diego, CA	N/A	PC	To provide nutrition, housing, and wraparound supports to homeless/low-income seniors	\$125,000
Soar For Youth Berkeley, CA	N/A	PC	To support foster youth to graduate from high school and enroll in college	\$40,000
Southern California Grantmakers Los Angeles, CA	N/A	PC	2024 Membership Dues	\$7,600

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Special Olympics Arizona Inc. Goodyear, AZ	N/A	PC	To provide inclusive sports and fitness opportunities for adults with and without intellectual disabilities in Arizona, Alaska, and Hawai'i	\$180,000
Special Olympics Washington Seattle, WA	N/A	PC	To provide inclusive sports and recreation opportunities for adults with intellectual disabilities	\$75,000
Special Recreation Services Inc. Reno, NV	N/A	PC	To ensure that individuals with IDD live quality lives filled with meaningful relationships, skills, and opportunities to learn, work, and grow	\$37,500
St. Barnabas Senior Center of Los Angeles Los Angeles, CA	N/A	PC	To provide nutrition and health and wellness programs to low-income elders	\$100,000
Store To Door Portland, OR	N/A	PC	To provide volunteer-based grocery shopping, delivery, and engagement to homebound elders	\$60,000
Swords To Plowshares Veterans Rights Organization San Francisco, CA	N/A	PC	To advocate for and serve homeless and low-income veterans locally and nationally	\$250,000
Texas State University Development Foundation San Marcos, TX	N/A	PC	To support the growth of a new inclusive, four-year post-secondary program for individuals with IDD in Central Texas	\$100,000
The Arc of San Antonio Inc. San Antonio, TX	N/A	PC	To provide services, support, and resources for adults with intellectual and developmental disabilities and their families	\$100,000
The Arc of the United States Washington, DC	N/A	PC	To advocate and support individuals with intellectual and developmental disabilities through access to information, resources, education, and nationwide programs that foster inclusion	\$100,000
The Arc of the United States Washington, DC	N/A	PC	To advocate and support individuals with intellectual and developmental disabilities through access to information, resources, education, and nationwide programs that foster inclusion	\$100,000
The Belonging Network Support for Families and Youth Association Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To support foster youth and adoptive families in British Columbia	\$50,000
The Canadian National Institute for the Blind New Westminster, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide career training support for adults with vision loss or who are partially sighted in British Columbia	\$50,000

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The Garth Homer Society Victoria, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide supportive services focused on community inclusion, building independence, and employment for adults with disabilities	\$50,000
The Garth Homer Society Victoria, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide supportive services focused on community inclusion, building independence, and employment for adults with disabilities	\$50,000
The Kelsey San Francisco, CA	N/A	PC	To advance a future where all people with and without disabilities can live full lives in connected, integrated communities	\$100,000
The Mission Continues St. Louis, MO	N/A	PC	To promote veteran reintegration in the Western U.S. through voluntary community service	\$190,000
The National Military Family Association Alexandria, VA	N/A	PC	To support military spouse education and professional training opportunities	\$150,000
The SCAN Foundation Long Beach, CA	N/A	SO II	To support California's implementation of its statewide Master Plan for Aging	\$150,000
The Society for the Relief of Disabled Children Pokfulam Hong Kong	N/A	NC (Foreign Public Charity Equivalent)	To subsidize genetic testing for children with disabilities	\$50,000
The Teen Project Inc. Van Nuys, CA	N/A	PC	To provide drug treatment, housing, and support to youth with histories of foster care, homelessness, and trafficking	\$100,000
Treehouse Seattle, WA	N/A	PC	To support foster youth to graduate from high school and transition to independence	\$125,000
Twin Cities Public Television Inc. St. Paul, MN	N/A	PC	To provide information and resources on healthy aging to older adults nationwide	\$100,000
United Friends of the Children Los Angeles, CA	N/A	PC	To provide education support and transitional housing for foster youth	\$125,000
United States Veterans Initiative Los Angeles, CA	N/A	PC	To provide transitional housing and supportive services to women veterans	\$150,000
University of Denver Denver, CO	N/A	PC	To provide pro bono legal services, representation, and advice to veterans across Colorado and in Native American Communities in New Mexico and Wyoming.	\$95,000
University of Houston System Houston, TX	N/A	GOV	To raise awareness about the harms of the child welfare system and build political will for alternative strategies to keep children safe in their homes	\$75,000

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University of San Diego San Diego, CA	N/A	PC	To ensure the interests of foster youth are adequately addressed in court and in legislation	\$75,000
University of San Diego San Diego, CA	N/A	PC	To provide free legal services to veterans	\$50,000
University of Utah Salt Lake City, UT	N/A	PC	To support multi-sector plan for Multi-Sector Plan development and planning in Utah	\$20,000
Urban Peak Denver Denver, CO	N/A	PC	To support Denver's homeless youth and youth at risk of homelessness	\$75,000
Utah Health & Human Rights Project Murray, UT	N/A	PC	To support the mental health of unaccompanied refugee minors and their foster families	\$40,000
Vancouver Community College Foundation Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide vocational education and training for students with developmental disabilities	\$50,000
Verde Valley Caregivers Coalition Sedona, AZ	N/A	PC	To help older adults maintain optimal independence and experience a better quality of life	\$75,000
Veterans Legal Institute Tustin, CA	N/A	PC	To provide pro-bono legal services to homeless, at-risk, disabled, and low-income veterans.	\$75,000
Veterans Transition Network Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide mental health care to assist Canadian veterans to reintegrate into their communities	\$75,000
Village Movement California San Francisco, CA	N/A	PC	To expand the Village Movement model to additional communities across California	\$75,000
Volunteer Interfaith Caregivers Southwest Houston, TX	N/A	PC	To organize community volunteers to provide free services and transportation to frail elders	\$30,000
Volunteers of America Inc. Sheridan, WY	N/A	PC	To offer various supportive services for low-to-no-income veterans and their families living in Wyoming	\$50,000
VTC Enterprises Santa Maria, CA	N/A	PC	To build independence, community participation, and employment capabilities for adults with severe disabilities	\$50,000
War Horse News Richlands, NC	N/A	PC	To support investigative journalism and human stories that demonstrate how service and military policies impact the lives of veterans and military families	\$100,000
West Marin Senior Services Point Reyes Station, CA	N/A	PC	To provide care management and supportive services to help rural elders age in place	\$60,000

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West Texas Counseling & Guidance Inc. San Angelo, TX	N/A	PC	To provide counseling and mental health services to service members, veterans, and their families in the Permian Basin region in Texas and Southeast New Mexico	\$100,000
Workshops for Warriors Inc. San Diego, CA	N/A	PC	To provide vocational skills training and certification to transitioning veterans in San Diego	\$125,000
Yellowstone CASA Inc. Billings, MT	N/A	PC	To provide foster youth with trained volunteers to serve as advocates and mentors	\$30,000
YMCA of San Diego County San Diego, CA	N/A	PC	To support kinship caregivers in San Diego County	\$50,000
Youth Law Center San Francisco, CA	N/A	PC	To ensure foster youth have the supports and care they need to thrive	\$100,000
Zero8hundred Inc. San Diego, CA	N/A	PC	To provide assistance, referrals, counseling, and support to service members and their families in the San Diego area during the transition to civilian life	\$75,000
Total ▶ 3a				\$18,991,726

3b. Approved during the year for future payment

Recipient Name and Address	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation Status of Recipient	Purpose of Grant or Contribution	Future Payment Amount
A Home Within Inc. Oakland, CA	N/A	PC	To provide high-quality, consistent, long-term mental health support for foster youth	\$110,000
A Sanctuary For Military Families Inc. Pagosa Springs, CO	N/A	PC	To provide therapeutic retreats and support for military families.	\$50,000
Age UK East London London United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To support older adults in East London to age safely in community	\$50,000
Alliance For Childrens Rights Los Angeles, CA	N/A	PC	To ensure L.A.'s foster youth have access to stable homes, health care, and education	\$125,000
Another Chance House Amarillo, TX	N/A	PC	To provide housing and supportive services to homeless veterans in the Texas panhandle	\$40,000
Arc California Sacramento, CA	N/A	PC	To advocate for and protect the human rights of people with intellectual and developmental disabilities and support their full inclusion in the community	\$175,000

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Bay Area Outreach and Recreation Program Berkeley, CA	N/A	PC	To provide sports, recreation, and outdoor adventures to individuals with disabilities	\$45,000
Bet Tzedek Los Angeles, CA	N/A	PC	To provide free legal services to low-income adults with IDD and their families/caregivers in the LA area	\$75,000
Beyond Emancipation Oakland, CA	N/A	PC	To support foster youth as they transition to adulthood	\$75,000
Big Brothers Big Sisters of San Diego County Inc. San Diego, CA	N/A	PC	To provide mentoring support for military children in the San Diego area	\$50,000
California Youth Connection Oakland, CA	N/A	PC	To develop foster youths' leadership and advocacy skills	\$125,000
Channel Islands Young Men's Christian Association Carpinteria, CA	N/A	PC	To provide comprehensive services to foster and homeless youth	\$35,000
Children and Youth Justice Center Seattle, WA	N/A	PC	To support foster, homeless, and juvenile justice-involved youth in Washington State	\$50,000
Churchie Foundation Limited East Brisbane Australia	N/A	NC (Foreign Public Charity Equivalent)	To provide scholarships and financial aid to students at Anglican Church Grammar School	\$125,000
Churchie Foundation Limited East Brisbane Australia	N/A	NC (Foreign Public Charity Equivalent)	To provide scholarships and financial aid to students at Anglican Church Grammar School	\$125,000
Columbus Foundation Inc. Salt Lake City, UT	N/A	PC	To provide employment-related training and independent living services to young adults with Autism Spectrum Disorder (ASD)	\$55,000
Council On Quality & Leadership In Supports For People With Disabilities Towson, MD	N/A	PC	To provide leadership training and support for emerging nonprofit leaders of organizations serving adults with IDD	\$130,000
Court Appointed Special Advocates Of Travis County Austin, TX	N/A	PC	To support Travis County youth transitioning out of the foster care system	\$50,000
Creative Growth Inc. Oakland, CA	N/A	PC	To strengthen professional opportunities and advance the inclusion of artists with developmental disabilities in contemporary art	\$50,000
Depaul UK London United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To provide emergency, transitional housing, and support services to at-risk youth in London	\$100,000
Depaul UK London United Kingdom	N/A	NC (Foreign Public Charity Equivalent)	To provide emergency, transitional housing, and support services to at-risk youth in London	\$100,000

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Disability Belongs Fredericksburg, VA	N/A	PC	To promote, educate, and advance policies and practices that advocate for full inclusion of individuals with disabilities	\$150,000
Family Builders By Adoption Alameda, CA	N/A	PC	To support foster/adoptive families and youth in the Bay Area	\$50,000
Family Caregiver Alliance San Francisco, CA	N/A	PC	To provide comprehensive information, training, and support to family caregivers	\$70,000
Family Eldercare Inc. Austin, TX	N/A	PC	To help vulnerable elders to age in place through access to coordinated supportive services	\$125,000
First Place for Youth Oakland, CA	N/A	PC	To provide housing and wraparound services to youth transitioning from foster care	\$125,000
Fostering Media Connections Los Angeles, CA	N/A	PC	To deepen understanding of child welfare, youth justice, and youth homelessness issues	\$75,000
Friends for Life Waco, TX	N/A	PC	To provide direct services, care coordination, money management, and advocacy that support individuals with disabilities to live independently for as long as possible	\$50,000
Friends of the Children - National Office Portland, OR	N/A	PC	To provide long-term one-on-one mentoring and support to at-risk youth and their families	\$100,000
Generations United Inc. Washington, DC	N/A	PC	To provide tools and resources to promote the importance of intergenerational connection	\$200,000
Generations United Inc. Washington, DC	N/A	PC	To provide tools and resources to promote the importance of intergenerational connection	\$200,000
Heart & Soul Salt Lake City, UT	N/A	PC	To improve quality of life for elders in long-term care through high quality live entertainment	\$50,000
Highline College Foundation Des Moines, WA	N/A	PC	To provide an inclusive college-based certificate program that allows transitioning youth with disabilities to identify and obtain employment	\$50,000
Hire Heroes USA Alpharetta, GA	N/A	PC	To provide career services to transitioning service members, veterans, and military spouses that empower them to succeed in the civilian workforce	\$200,000
Home Front Military Network Colorado Springs, CO	N/A	PC	To provide resource navigation and assistance for veterans living in Colorado	\$50,000
Homeless Youth Alliance Inc. San Francisco, CA	N/A	PC	To provide supportive services to homeless youth in San Francisco	\$50,000
Institute On Aging San Francisco, CA	N/A	PC	To provide necessary supports and services to assist in caregiving and well-being of elders	\$100,000

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Interfaith Community Services Inc. Escondido, CA	N/A	PC	To provide mental health and homeless services for veterans experiencing homelessness in San Diego County.	\$125,000
John Burton Advocates for Youth San Francisco, CA	N/A	PC	To ensure California's foster and homeless youth have access to education, housing, and economic security	\$110,000
La Plaza De Encuentro Gathering Place Albuquerque, NM	N/A	PC	To provide training to a culturally competent Spanish speaking direct care workforce	\$100,000
LifeMoves Santa Clara, CA	N/A	PC	To provide homelessness services to veteran families in San Mateo and Santa Clara Counties	\$90,000
Lifetime Arts Pelham, NY	N/A	PC	To engage elders through arts programming in partnership with public sector partners	\$225,000
Lighthouse for the Blind Inc. Seattle, WA	N/A	PC	To promote workplace advancement and full participation in the community for adults who are DeafBlind	\$40,000
Los Angeles LGBT Center Los Angeles, CA	N/A	PC	To provide supportive services to LGBT older adults living in Los Angeles County	\$175,000
Lyford Cay Foundation Inc. Greenwich, CT	N/A	PC	To prepare low-income Bahamian students for high school graduation and post-secondary or career technical education	\$100,000
Lyford Cay Foundation Inc. Greenwich, CT	N/A	PC	To prepare low-income Bahamian students for high school graduation and post-secondary or career technical education	\$100,000
Marin Humane Society Novato, CA	N/A	PC	To improve the health and quality of life of low-income seniors through pet care support	\$40,000
Meals on Wheels Diablo Region Walnut Creek, CA	N/A	PC	To provide community engagement, fall prevention, and care management services to older adults	\$80,000
Mental Health America of Greater Houston Inc. Houston, TX	N/A	PC	To provide peer support, mentorship, and resource referrals for veterans in the greater Houston area	\$100,000
Mockingbird Society Seattle, WA	N/A	PC	To provide leadership development and advocacy training to foster and homeless youth	\$100,000
Move United Rockville, MD	N/A	PC	To encourage low-income young adults with disabilities to engage in sports in their communities	\$120,000
Mt. Carmel Veterans Service Center Colorado Springs, CO	N/A	PC	To support service members, veterans, and their families in Southern Colorado	\$100,000

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National Disability Institute Inc. Washington, DC	N/A	PC	To advocate and build a better economic future for people with disabilities	\$125,000
New Directions Inc. Los Angeles, CA	N/A	PC	To provide transitional housing, behavioral health services, and homeless services for veterans	\$150,000
Northwest Justice Project Seattle, WA	N/A	PC	To provide legal services to low-income veterans in Washington State	\$110,000
On Lok Day Services San Francisco, CA	N/A	PC	To provide culturally sensitive wellness programs, healthy meals, and case management	\$75,000
On The Move Napa, CA	N/A	PC	To support foster youth to successfully transition into adulthood	\$100,000
Plan Institute for Citizenship & Disability Burnaby, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To empower people with disabilities to live fully engaged lives through educational initiatives, community-based projects, and advocating for policy reform	\$100,000
Power To Be Adventure Therapy Society Victoria, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To advocate and provide inclusive adaptive recreation programming for adults with disabilities	\$80,000
PsychArmor Institute Inc. San Diego, CA	N/A	PC	To provide free training programs that support those serving veterans	\$50,000
Public Counsel Los Angeles, CA	N/A	PC	To provide legal services for foster and guardianship youth and families in Los Angeles	\$150,000
Raise The Future Denver, CO	N/A	PC	To support the adoption of hard to place foster youth	\$100,000
Regents of the University of Michigan Ann Arbor, MI	N/A	PC	To support expansion of the Peer Advisors for Veterans Education in the Western U.S.	\$100,000
RightWay Foundation Los Angeles, CA	N/A	PC	To provide employment support, housing, and trauma-informed mental health services for foster youth	\$50,000
Safe & Sound San Francisco, CA	N/A	PC	To prevent child abuse and support vulnerable families to become healthy and stable	\$175,000
Sanctuary of Hope Los Angeles, CA	N/A	PC	To provide comprehensive support services to transition-age youth in South Los Angeles	\$50,000
Seniors' Resource Center Inc. Denver, CO	N/A	PC	To provide care management and comprehensive support services to elders and their families	\$65,000
Serving Seniors San Diego, CA	N/A	PC	To provide nutrition, housing, and wraparound supports to homeless/low-income seniors	\$125,000

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Special Olympics Arizona Inc. Goodyear, AZ	N/A	PC	To provide inclusive sports and fitness opportunities for adults with and without intellectual disabilities in Arizona, Alaska, and Hawai'i	\$180,000
St. Barnabas Senior Center of Los Angeles Los Angeles, CA	N/A	PC	To provide nutrition and health and wellness programs to low-income elders	\$100,000
Texas State University Development Foundation San Marcos, TX	N/A	PC	To support the growth of a new inclusive, four-year post-secondary program for individuals with IDD in Central Texas	\$100,000
The Arc of San Antonio Inc. San Antonio, TX	N/A	PC	To provide services, support, and resources for adults with intellectual and developmental disabilities and their families	\$100,000
The Arc of the United States Washington, DC	N/A	PC	To advocate and support individuals with intellectual and developmental disabilities through access to information, resources, education, and nationwide programs that foster inclusion	\$100,000
The Canadian National Institute for the Blind New Westminster, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide career training support for adults with vision loss or who are partially sighted in British Columbia	\$50,000
The Canadian National Institute for the Blind New Westminster, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide career training support for adults with vision loss or who are partially sighted in British Columbia	\$50,000
The Mission Continues St. Louis, MO	N/A	PC	To promote veteran reintegration in the Western U.S. through voluntary community service	\$150,000
The Teen Project Inc. Van Nuys, CA	N/A	PC	To provide drug treatment, housing, and support to youth with histories of foster care, homelessness, and trafficking	\$100,000
United Friends of the Children Los Angeles, CA	N/A	PC	To provide education support and transitional housing for foster youth	\$125,000
United States Veterans Initiative Los Angeles, CA	N/A	PC	To provide transitional housing and supportive services to women veterans	\$150,000
University of Denver Denver, CO	N/A	PC	To provide pro bono legal services, representation, and advice to veterans across Colorado and in Native American Communities in New Mexico and Wyoming.	\$95,000
Verde Valley Caregivers Coalition Sedona, AZ	N/A	PC	To help older adults maintain optimal independence and experience a better quality of life	\$75,000

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Veterans Transition Network Vancouver, BC Canada	N/A	NC (Foreign Public Charity Equivalent)	To provide mental health care to assist Canadian veterans to reintegrate into their communities	\$75,000
Volunteers of America Inc. Sheridan, WY	N/A	PC	To offer various supportive services for low-to-no-income veterans and their families living in Wyoming	\$50,000
VTC Enterprises Santa Maria, CA	N/A	PC	To build independence, community participation, and employment capabilities for adults with severe disabilities	\$50,000
West Texas Counseling & Guidance Inc. San Angelo, TX	N/A	PC	To provide counseling and mental health services to service members, veterans, and their families in the Permian Basin region in Texas and Southeast New Mexico	\$100,000
YMCA of San Diego County San Diego, CA	N/A	PC	To support kinship caregivers in San Diego County	\$50,000
Youth Law Center San Francisco, CA	N/A	PC	To ensure foster youth have the supports and care they need to thrive	\$100,000
Total ▶ 3b				\$8,395,000

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For Year Ended December 31, 2024

INFORMATION WITH RESPECT TO EXPENDITURE RESPONSIBILITY GRANTS

Grantee:

May Wong Smith Trust
c/o School of Economics and Finance
University of Saint Andrews
Castlecliffe
Saint Andrews Fife KY16 9AJ Scotland

Payments:

\$300,000 paid on 11/4/2011

\$300,000 Total

Purpose:

To establish a permanent endowment fund to further the mission of the May Wong Smith Trust: establishing and maintaining St. Leonard's College as part of the University of St. Andrews, and providing fellowships, scholarships, and prizes to students in the University of St. Andrews, assisting such students financially and generally looking after their welfare.

Amount of Grant Spent by Grantee:

\$8,357

Date of Report Received from Grantee:

12/16/2024 Annual ER Report

Diversion:

To the knowledge of the foundation, and based on the information furnished by the grantee, no part has been used for other than its intended purpose.

Verification:

The foundation reviewed the Grant Report of 12/16/2024 but did not undertake any verification of the grantee's report as there has not been any reason to doubt its accuracy or reliability (Reg. 53.4945-5(c)).