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Form 990-PF Department of the Treasury Internal Revenue Service

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

OMB No. 1545-0047 2022 Open to Public Inspection

For calendar year 2022, or tax year beginning 11-01-2022, and ending 10-31-2023

Name of foundation: ROBERT M BEREN FAMILY FOUNDATION INC C/O DONNA STUCKY. A Employer identification number: 48-0990309. B Telephone number: (316) 265-3311. C If exemption application is pending, check here. D 1. Foreign organizations, check here. D 2. Foreign organizations meeting the 85% test, check here and attach computation. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. G Check all that apply: Initial return, Final return, Address change, etc. H Check type of organization: Section 501(c)(3) exempt private foundation. I Fair market value of all assets at end of year: \$510,278,668. J Accounting method: Cash.

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Administrative Expenses (13-22).

Opt	23	Other expenses (attach schedule)	454,061	0	0
	24	Total operating and administrative expenses.			
		Add lines 13 through 23	2,890,306	879,867	1,131,300
	25	Contributions, gifts, grants paid	37,255,526		37,255,526
	26	Total expenses and disbursements. Add lines 24 and 25	40,145,832	879,867	38,386,826
	27	Subtract line 26 from line 12:			
	a Excess of revenue over expenses and disbursements	447,166,533			
	b Net investment income (if negative, enter -0-)		1,707,999		
	c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions. Cat. No. 11289X Form 990-PF (2022)

Part II	Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	1,381,942	2,782,449	2,782,449
	2	Savings and temporary cash investments	1,319,232	5,105,257	5,105,257
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	94,605,190	530,131,108	496,474,242
	c	Investments—corporate bonds (attach schedule)	0	6,454,656	5,916,720
	11	Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	11,335	10,762	0
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	97,317,699	544,484,232	510,278,668	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue	-492,483	-492,483	
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
23	Total liabilities (add lines 17 through 22)	-492,483	-492,483		
Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/>				
	and complete lines 24, 25, 29 and 30.				
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/>					
and complete lines 26 through 30.					
26	Capital stock, trust principal, or current funds	0	0		
27	Paid-in or capital surplus, or land, bldg., and equipment fund	0	0		

Net A:	28	Retained earnings, accumulated income, endowment, or other funds	97,810,182	544,976,715
	29	Total net assets or fund balances (see instructions)	97,810,182	544,976,715
	30	Total liabilities and net assets/fund balances (see instructions)	97,317,699	544,484,232

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	97,810,182
2	Enter amount from Part I, line 27a	2	447,166,533
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	544,976,715
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	544,976,715

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a ACTIVISION BLIZZARD		2023-04-27	2023-10-02
b ACTIVISION BLIZZARD		2023-04-27	2023-10-02
c ACTIVISION BLIZZARD		2023-05-02	2023-10-02
d AMAZON COM INC		2022-07-22	2023-04-19
e AMAZON COM INC		2021-02-26	2023-01-18
AMAZON COM INC		2021-03-02	2023-01-18
AMAZON COM INC		2021-05-19	2023-01-18
AMAZON COM INC		2021-08-20	2023-01-18
AMERICAN TOWER CORP SHARES		2021-08-23	2023-04-27
AMERICAN TOWER CORP SHARES		2021-08-23	2023-09-26
AMERICAN TOWER CORP SHARES		2021-09-24	2023-09-26
APPLE INC		2015-09-30	2023-09-21
APPLE INC		2016-05-11	2023-09-21
HONEYWELL INTL INC		2012-12-19	2023-01-24
HONEYWELL INTL INC		2012-12-19	2023-05-02
HONEYWELL INTL INC		2012-12-19	2023-05-02
IAC INTERACTIVE CORP		2021-06-18	2022-11-08
IAC INTERACTIVE CORP		2021-08-20	2022-11-08
MARRIOTT INTL INC CLASS A		2020-06-19	2023-04-27
MATCH GROUP INC COMMON		2017-04-07	2023-04-19
NEXTERA ENERGY INC		2021-02-23	2023-04-19
NEXTERA ENERGY INC		2021-05-19	2023-04-19
VERALTO CORPORATION COMMON STOCK		2014-07-07	2023-10-12
VERALTO CORPORATION COMMON STOCK		2015-06-09	2023-10-12
VERALTO CORPORATION COMMON STOCK		2016-07-12	2023-10-12
VERALTO CORPORATION COMMON STOCK			2023-10-12
AMERICAN EXPRESS CO		1987-12-28	2023-01-19
AMERICAN EXPRESS CO		1990-07-31	2023-01-19
AMERICAN EXPRESS CO		2008-11-14	2023-01-19
BERKSHIRE HATHAWAY CLASS A		1983-02-10	2023-10-12
BERKSHIRE HATHAWAY CLASS A		1983-02-10	2023-10-12
BERKSHIRE HATHAWAY CLASS A		1990-09-25	2023-10-12
BERKSHIRE HATHAWAY CLASS A		1990-12-28	2023-10-10
BERKSHIRE HATHAWAY CLASS A		1990-12-31	2023-10-10
BERKSHIRE HATHAWAY CLASS A		1997-05-27	2023-10-10
BROOKFIELD AST MGMT CL A LTD VOTING SHS		2009-04-30	2023-04-19
BROOKFIELD AST MGMT CL A LTD VOTING SHS		2009-05-05	2023-04-19
BROOKFIELD AST MGMT CL A LTD VOTING SHS		2009-06-18	2023-04-19
BROOKFIELD AST MGMT CL A LTD VOTING SHS		2009-06-22	2023-04-19
COMCAST CORP CLASS A		2009-05-06	2023-06-07
COMCAST CORP CLASS A		2009-05-06	2023-07-03
COMCAST CORP CLASS A		2009-05-07	2023-01-27
COMCAST CORP CLASS A		2009-05-07	2023-04-27
M & T BK CORP		1987-12-07	2023-09-27
MARRIOTT INTL INC CLASS A		2020-06-04	2023-04-27
NEXTERA ENERGY INC		2021-01-19	2023-01-13
NEXTERA ENERGY INC		2021-01-19	2023-05-09
NEXTERA ENERGY INC		2021-01-19	2023-05-11

M & T BK CORP		1987-12-07	2023-01-30
CAPITAL GAINS DIVIDENDS	P		

	(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	4,308,482		4,213,140	95,342
b	374,651		309,154	65,497
c	749,301		732,720	16,581
d	1,047,508		1,222,447	-174,939
e	1,636,605		2,621,737	-985,132
	481,354		782,931	-301,577
	770,167		1,284,453	-514,286
	2,117,960		3,503,251	-1,385,291
	917,552		1,301,310	-383,758
	409,826		461,525	-51,699
	655,722		738,440	-82,718
	288,229		45,255	242,974
	4,952,303		5,097,330	-145,027
	827,593		244,264	583,329
	99,329		30,533	68,796
	894,800		274,797	620,003
	312,790		1,051,296	-738,506
	670,264		1,929,216	-1,258,952
	1,231,063		674,684	556,379
	394,368		265,115	129,253
	709,644		668,576	41,068
	670,220		613,792	56,428
	496,653		604,203	-107,550
	248,327		302,102	-53,775
	124,201		151,051	-26,850
	53			53
	293,566		11,682	281,884
	220,175		11,332	208,843
	1,541,222		220,863	1,320,359
	1,572,177		1,659,303	-87,126
	1,048,118		1,106,202	-58,084
	4,192,472		4,424,808	-232,336
	7,903,195		8,296,515	-393,320
	5,278,669		5,531,010	-252,341
	18,490,151		19,358,535	-868,384
	182,873		29,833	153,040
	182,841		29,117	153,724
	369,425		66,264	303,161
	85,805		15,449	70,356
	397,437		79,484	317,953
	1,033,389		198,709	834,680
	1,205,372		238,800	966,572
	394,207		79,600	314,607
	308,760		9,379	299,381
	1,066,922		665,195	401,727
	422,479		411,726	10,753
	378,109		411,726	-33,617
	151,945		164,690	-12,745
	76,976		1,876	75,100
	89,962			89,962

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) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			95,342
b			65,497
c			16,581
d			-174,939

e				-985,132
				-301,577
				-514,286
				-1,385,291
				-383,758
				-51,699
				-82,718
				242,974
				-145,027
				583,329
				68,796
				620,003
				-738,506
				-1,258,952
				556,379
				129,253
				41,068
				56,428
				-107,550
				-53,775
				-26,850
				53
				281,884
				208,843
				1,320,359
				-87,126
				-58,084
				-232,336
				-393,320
				-252,341
				-868,384
				153,040
				153,724
				303,161
				70,356
				317,953
				834,680
				966,572
				314,607
				299,381
				401,727
				10,753
				-33,617
				-12,745
				75,100
				89,962

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	129,792
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	

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)	}	1	23,741
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	23,741

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	23,741
6	Credits/Payments:		
a	2022 estimated tax payments and 2021 overpayment credited to 2022	6a	209,072
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	209,072
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2221 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	185,331
11	Enter the amount of line 10 to be: Credited to 2023 estimated tax ▶ 185,331 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?		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		No
c Did the foundation file Form 1120-POL for this year?.		No
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? <i>If "Yes," attach a detailed description of the activities.</i>		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: round bullet By language in the governing instrument, or round bullet 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?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶KS		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation .</i>	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2022 or the taxable year beginning in 2022? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		No

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Part VI-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," attach schedule. See instructions.</i>	11		No
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i>	12		No
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶N/A	13	Yes	
14 The books are in care of ▶THE FOUNDATION Telephone no. ▶(316) 265-3311			
Located at ▶2020 N BRAMBLEWOOD WICHITA KS ZIP+4 ▶67206			

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here <input type="checkbox"/>			15
16	At any time during calendar year 2022, 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?	Yes	No	
	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?		No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?		No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?		No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?		No
(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)?		No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)		No
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions.	1b	
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 2022?	1d	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?	2a	No
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	No
b	If "Yes," did it have excess business holdings in 2022 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 <i>Schedule C, Form 4720</i> , to determine if the foundation had excess business holdings in 2022.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2022?	4b	No

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

5a	During the year did the foundation pay or incur any amount to:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)		No
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		No
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		No
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	5a(4)	Yes	
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)		No
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.	5b	Yes	
c	Organizations relying on a current notice regarding disaster assistance check <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?	5d	Yes	
	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?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a		No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	8		No

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NANCY T BEREN 2020 N BRAMBLEWOOD WICHITA, KS 67206	DIRECTOR 1.00	250,000	0	0
AMY A BEREN BRESSMAN 2020 N BRAMBLEWOOD WICHITA, KS 67206	DIRECTOR 1.00	250,000	0	0
JULIE BEREN PLATT 2020 N BRAMBLEWOOD WICHITA, KS 67206	DIRECTOR 1.00	250,000	0	0
ADAM E BEREN 2020 N BRAMBLEWOOD WICHITA, KS 67206	DIRECTOR 1.00	250,000	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000. **0**

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
FIRST MANHATTAN COMPANY 399 PARK AVENUE NEW YORK, NY 10022	INVESTMENT ADVICE	879,530

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 _____	

2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

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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	526,001,454
b Average of monthly cash balances.	1b	3,634,493
c Fair market value of all other assets (see instructions).	1c	0
d Total (add lines 1a, b, and c).	1d	529,635,947
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	529,635,947
4 Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	7,944,539
5 Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	521,691,408
6 Minimum investment return. Enter 5% (0.05) of line 5.	6	26,084,570

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	26,084,570
2a Tax on investment income for 2022 from Part V, line 5.	2a	23,741
b Income tax for 2022. (This does not include the tax from Part V.)	2b	
c Add lines 2a and 2b.	2c	23,741
3 Distributable amount before adjustments. Subtract line 2c from line 1.	3	26,060,829
4 Recoveries of amounts treated as qualifying distributions.	4	0
5 Add lines 3 and 4.	5	26,060,829
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	26,060,829

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	38,386,826
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	38,386,826

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Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				26,060,829
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only.			9,791,740	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2017.				
b From 2018.				
c From 2019.				
d From 2020.				
e From 2021.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2022 from Part XI, line 4: \blacktriangleright \$ 38,386,826				
a Applied to 2021, but not more than line 2a			9,791,740	
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 2022 distributable amount.				26,060,829
e Remaining amount distributed out of corpus	2,534,257			
5 Excess distributions carryover applied to 2022. (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	2,534,257			
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 2021. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a.	2,534,257			
10 Analysis of line 9:				
a Excess from 2018.				
b Excess from 2019.				
c Excess from 2020.				
d Excess from 2021.				
e Excess from 2022.	2,534,257			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2022, enter the date of the ruling.	
b Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)	

	OF SUBSTANTIAL CONTRIBUTOR			
a Paid during the year				
ST JOSEPH'S INDIAN SCHOOL PO BOX 300 CHAMBERLAIN, SD 573259919	NONE	PC	GENERAL FUND	100
FURRY FRIENDS 100 CAPITAL STREET JUPITER, FL 33458	NONE	PC	GENERAL FUND	100
RABBINICAL COLLEGE OF TELSHE 400 MOUNT WILSON LANE BALTIMORE, MD 21208	NONE	PC	GENERAL FUND	180
NER ISRAEL RABBINICAL COLLEGE 400 MOUNT WILSON LANE BALTIMORE, MD 21208	NONE	PC	GENERAL FUND	180
TELSHE YESHIVA 28400 EUCLID AVE WICKLIFFE, OH 44092	NONE	PC	GENERAL FUND	180
RED BARN STUDIO MUSEUM & RAYMER SOCIETY FOR THE ARTS 212 SOUTH MAIN LINDSBORG, KS 67456	NONE	PC	GENERAL FUND	200
ROSE HILL CEMETERY 6841 EAST 62ND AVENUE COMMERCE CITY, CO 80022	NONE	PC	GENERAL FUND	286
THE USO P O BOX 96860 WASHINGTON, DC 200777677	NONE	PC	GENERAL FUND	300
ALZHEIMER'S ACCOCIATION - SOUTHEAST FLORIDA CHAPTER 3323 W COMMERCIAL BOULEVARD SUITE 260 FORT LAUDERDALE, FL 333093447	NONE	PC	GENERAL FUND	400
NATIONAL JEWISH HEALTH 1400 JACKSON STREET DENVER, CO 802062762	NONE	PC	IN MEMORY OF RMB	400
ARTHRITIS FOUNDATION 400 HIBISCUS STREET SUITE 100 WEST PALM BEACH, FL 33401	NONE	PC	GENERAL FUND	400
THE LEUKEMIA & LYMPHOMA SOCIETY PO BOX 98011 WASHINGTON, DC 200908011	NONE	PC	IN MEMORY OF RMB	400
TUSKEGEE AIRMAN NATIONAL HISTORICAL MUSEUM PO BOX 1808 MERRIFIELD, VA 221168008	NONE	PC	GENERAL FUND	500
FRIENDS OF HARVARD JUDAICA COLLECTION - WIDENER LIBRARY HARVARD UNIVERSITY CAMBRIDGE, MA 02138	NONE	PC	IN MEMORY OF RMB	500
NATIONAL CENTER FOR PUBLIC POLICY RESEARCH 20 F STREET SUITE 700 WASHINGTON, DC 20001	NONE	PC	IN MEMORY OF RMB	500

DAVID HAROWITZ FREEDOM CENTER P O BOX 55089 SHERMAN OAKS, CA 91499	NONE	PC	GENERAL FUND	1,000
ST JUDE CHILDREN'S HOSPITAL 262 DANNY THOMAS PL MEMPHIS, TN 38105	NONE	PC	GENERAL FUND	1,000
AMERICAN CANCER SOCIETY - FLORIDA DIVISION PO BOX 13300 TAMPA, FL 336813300	NONE	PC	GENERAL FUND	1,000
TRUMAN LIBRARY INSTITUTE 500 WEST US HIGHWAY 24 INDEPENDENCE, MO 64050	NONE	PC	IN MEMORY OF RMB	1,000
AMERICAN HEART ASSOCIATION 11207 BLUE HERON BLVD N ST PETERSBURG, FL 33716	NONE	PC	GENERAL FUND	1,000
AMERICAN KIDNEY FUND PO BOX 11038 LEWISTON, ME 04243	NONE	PC	GENERAL FUND	1,000
PROSTATE CANCER FOUNDATION 1250 4TH ST SANTA MONICA, CA 90401	NONE	PC	GENERAL FUND	1,000
AYN RAND INSTITUTE 6 HUTTON CENTRE DRIVE SUITE 600 SANTA ANA, CA 92707	NONE	PC	GENERAL FUND	1,000
SOUTHERN INSTITUTE FOR EDUCATION AND RESEARCH - TULANE UNIVESITY MR BOX 1692 31 MCALISTER DRIVE NEW ORLEANS, LA 701185555	NONE	PC	GENERAL FUND	1,000
EMORY UNIVERSITY 1762 CLIFTON ROAD NE SUITE 1400 ATLANTA, GA 30322	NONE	PC	IN MEMORY OF RMB	1,000
KIDS CANCER FOUNDATION 246 ROYAL PALM BEACH BLVD ROYAL PALM BEACH, FL 33414	NONE	PC	GENERAL FUND/IN MEMORY OF RMB	1,000
FRIENDS OF THE JEWISH CHAPEL 326 FIRST ST SUITE 22 ANAPOLIS, MD 21403	NONE	PC	IN MEMORY OF RMB	1,000
HARVARD UNIVERSITY CENTER FOR JEWISH STUDIES 8 DIVINITY AVENUE CAMBRIDGE, MA 02138	NONE	PC	GENERAL	2,000
EISENHOWER FOUNDATION 200 SE 4TH STREET PO BOX 295 ABILENE, KS 67410	NONE	PC	GENERAL FUND	2,000
STAND WITH US 1801 W OLYPIC BLVD PASADENA, CA 911992215	NONE	PC	GENERAL FUND	2,000
HILLSDALE COLLEGE 33 E COLLEGE ST HILLSDALE, MI 482420000	NONE	PC	IN MEMORY OF RMB	2,000

HILLSDALE, MI 492429989 TUNNEL TO TOWERS P O BOX 70719 PHILADELPHIA, PA 191760719	NONE	PC	GENERAL FUND	2,000
FOUNDATION FOR PERIPHERAL NEUROPATHY 485 HALF DAY ROAD SUITE 350 BUFFALO GROVE, IL 60089	NONE	PC	GENERAL FUND	2,000
AMERICAN RED CROSS PO BOX 628205 ORLANDO, FL 328628205	NONE	PC	GENERAL FUND	2,000
NCSY 7200 W CAMINO REAL SUITE 214 BOCA RATON, FL 33433	NONE	PC	GENERAL FUND	2,000
EXPERIENCE CAMP PO BOX 5121 WESTPORT, CT 06881	NONE	PC	IN MEMORY OF RMB	3,000
WILSHIRE BOULEVARD TEMPLE SCHOOL 3663 WILSHIRE BOULEVARD LOS ANGELES, CA 90010	NONE	PC	IN MEMORY OF RMB	3,600
RODEPH SHOLOM SCHOOL - DAY SCHOOL 10 WEST 84TH STREET NEW YORK, NY 10024	NONE	PC	IN MEMORY OF RMB	3,600
INSTITUTE FOR HUMANE STUDIES 3434 WASHINGTON BOULEVARD ARLINGTON, VA 22201	NONE	PC	IN MEMORY OF RMB	4,000
JTA - 70 FACES MEDIA 24 WEST 30TH STREET 4TH FLOOR NEW YORK, NY 10001	NONE	PC	GENERAL FUND	5,000
ADAS ISRAEL - DAY SCHOOL 2850 QUEBEC ST NW WASHINGTON, DC 20008	NONE	PC	BROOKS HYAMS GAN FUND	5,000
MILTON GOTTESMAN JEWISH DAY SCHOOL OF THE NATION'S CAPITAL NORTH CAMPUS 6045 16TH STREET NW WASHINGTON, DC 20011	NONE	PC	ANNUAL FUND	5,000
INSIGHT THROUGH EDUCATION INC PO BOX 33054 PALM BEACH GARDENS, FL 33420	NONE	PC	IN MEMORY OF RMB	5,000
HILLELOF BROWARD AND PALM BEACH 777 GLADES ROAD BLDG LY-3A BOCA RATON, FL 33431	NONE	PC	IN MEMORY OF RMB	6,000
PRAGER UNIVERSITY FOUNDATION 15021 VENTURA BLVD 552 SHERMAN OAKS, CA 91403	NONE	PC	IN MEMORY OF RMB	6,000
FRIENDS OF HARVARD TENNIS 65 NORTH HARVARD STREET BOSTON, MA 02163	NONE	PC	HARVARD TENNIS	8,000
NATIONAL MULTIPLE SCLEROSIS PO BOX 4594 NEW YORK, NY 10163	NONE	PC	GENERAL FUND	10,000

AJC OF PALM BEACH 1900 NW CORPORATE BLVD SUITE 210W BOCA RATON, FL 33431	NONE	PC	GENERAL FUND	10,000
GARDENS JEWISH EXPERIENCE 180 BENT TREE DR PALM BEACH GARDENS, FL 33418	NONE	PC	IN MEMORY OF RMB	10,000
ISRAEL TENNIS CENTERS FOUNDATION 3275 WEST HILLSBORO BOULEVARD SUITE 102 DEERFIELD BEACH, FL 33442	NONE	PC	IN MEMORY OF RMB	10,000
PRESSMAN ACADEMY - DAY SCHOOL 1055 S LA CIENEGA BOULEVARD LOS ANGELES, CA 90035	NONE	PC	IN MEMORY OF RMB	10,000
JACK MILLER CENTER 3 BALA PLAZA W SUITE 401 BALA CYNWYD, PA 190049804	NONE	PC	IN MEMORY OF RMB	10,000
JEWISH NATIONAL FUND 78 RANDALL AVE ROCKVILLE CENTRE, NY 11570	NONE	PC	ANNUAL FUND	10,000
WJC AMERICAN SECTION 501 MADISON AVENUE NEW YORK, NY 10022	NONE	PC	GENERAL FUND	10,000
SHOVACH (CHF FOR SHOVACH) PO BOX 957 MOUNDRIDGE, KS 67107	NONE	PC	SUPPORT DURING THE WAR FOR SHOVACH	10,000
HANNAH SENESH - DAY SCHOOL 342 SMITH ST BROOKLYN, NY 11231	NONE	PC	IN MEMORY OF RMB	15,000
UNITED STATES HOLOCAUST MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON, DC 20024	NONE	PC	GENERAL FUND	18,000
FRIENDS OF YAD LAKASISH (LIFELINE FOR THE AGED) PO BOX 494 ENGLEWOOD, NJ 07631	NONE	PC	GENERAL	18,000
AMERICAN FRIENDS OF BEIT ISSIE SHAPIRO 25 WEST 45TH STREET 1405 NEW YORK, NY 10036	NONE	PC	GENERAL FUND	18,000
JUPITER MEDICAL CENTER 1210 S OLD DIXIE HWY JUPITER, FL 334587205	NONE	PC	IN MEMORY OF RMB	20,000
UNITED WAY OF PALM BEACH COUNTY 477 S ROSEMARY AVENUE STE 230 WEST PALM BEACH, FL 33401	NONE	PC	GENERAL FUND	25,000
CAMP RAMAH BERKSHIRES 1086 TEANECK ROAD SUITE 5B TEANECK, NJ 07666	NONE	PC	JEWISH SUMMER CAMPS	25,000
HARVARD HILLEL 50 MOUNT AUBURN ST	NONE	PC	GENERAL FUND	25,000

52 MOUINI AUBURN ST CAMBRIDGE, MA 02138				
WOUNDED WARRIOR PROJECT INC 4899 BELFORD RD SUITE 300 JACKSONVILLE, FL 32256	NONE	PC	GENERAL	35,000
FRIENDS OF PERACH INC -HINC 1274 49TH ST 515 BROOKLYN, NY 11219	NONE	PC	GENERAL	50,000
YESHIVA UNIVERSITY 500 WEST 185TH STREET BH 704 NEW YORK, NY 10033201	NONE	PC	GENERAL FUND	50,000
BAYIT BRIGADE AMERICA 2020 BRAMBLEWOOD WICHITA, KS 67206	NONE	PC	GENERAL	50,000
JEWISH GRADUATE SCHOOL INITIATIVE - JGSI 1543 SOUTH CREST DRIVE LOS ANGELES, CA 90035	NONE	PC	GENERAL FUND	50,000
ORAYTA 9687 PAVAROTTI TERRACE 102 BOYNTON BEACH, FL 33437	NONE	PC	SECURITY	54,000
AMERICAN FRIENDS OF SHALVA 315 5TH AVE NEW YORK, NY 10016	NONE	PC	GENERAL FUND	60,000
AMERICAN FRIENDS OF SHEBA MEDICAL CENTER 6505 WILSHIRE BLVD LOS ANGELES, CA 90048	NONE	PC	GENERAL	62,000
THE ASSOCIATION FOR SPIRITUAL CARE IN ISRAEL CO PEF ISRAEL ENDOWMENT FUNDS 630 THIRD AVE NEW YORK, NY 10017	NONE	PC	GENERAL	72,000
ISRAEL SPECIAL KIDS FUND - HINC 505 8TH AVE NEW YORK, NY 10018	NONE	PC	GENERAL	90,000
FRIENDS OF THE JERUSALEM COLLEGE OF TECHNOLOGY PO BOX 1703 NEW YORK, NY 10150	NONE	PC	GENERAL	100,000
PENN HILLEL 215 S 39TH ST PHILADELPHIA, PA 19104	NONE	PC	GENERAL	100,000
NE'EMAN FOUNDATION 867 BOYLTON ST FIFTH FLOOR 1324 BOSTON, MA 02116	NONE	PC	GENERAL	100,000
BROTHERS FOR LIFE 1126 34TH AVE 8TH FLOOR SEATTLE, WA 98122	NONE	PC	GENERAL	100,000
BRIGHAM AND WOMEN'S HOSPITAL 116 HUNTINGTON AVENUE 3RD FLOOR BOSTON, MA 021165712	NONE	PC	GENERAL FUND	100,000
	NONE	PC	IN MEMORY OF RMB	100,000

SINAI AKIBA ACADEMY (ALICE AND HAHUM LAINER SCHOOL) 10400 WILSHIRE BLVD LOS ANGELES, CA 90024				
AHAVATH ACHIM - HEBREW CONGREGATION 1850 NORTH WOODLAWN WICHTA, KS 67208	NONE	PC	PLEDGES - 2022	100,000
JEWISH POLICY CENTER 50 F STREET NW SUITE 100 WASHINGTON, DC 20001	NONE	PC	IN MEMORY OF RMB	100,000
OHR TORAH STONE 49 WEST 45TH STREET SUITE 701 NEW YORK, NY 10036	NONE	PC	GENERAL FUND	100,000
LA'ARETZ - HINC 315 LEONARD ST BROOKLYN, NY 11211	NONE	PC	GENERAL	125,000
DEEDLY INC DBA DEEDLY INC PROJECT RESCUE - HINC 2700 BAY AVE MIAMI BEACH, FL 33140	NONE	PC	GENERAL	125,000
CENTRAL FUND OF ISRAEL 461 CENTRAL AVENUE CEDARHURST, NY 11516	NONE	PC	GENERAL FUND	127,500
FRIENDS OF GIVAT HAVIVA (ATTN KIBBUTZ MOVEMENT) 500 7TH AVE 8TH FLOOR NEW YORK, NY 10018	NONE	PC	GENERAL	150,000
CAMP RAMAH 17525 VENTURA BLVD SUITE 310 ENCINO, CA 91316	NONE	PC	GENERAL FUND	150,000
ISRAEL STRONG FOUNDATION INC - HINC 100 PARK AVE STE PH4F FORT LEE, NJ 07024	NONE	PC	GENERAL	156,200
THE FOUNDATION FOR JEWISH RENAISSANCE INC - HINC PO BOX 1420 JACKSON, NJ 08527	NONE	PC	GENERAL	180,000
HILLEL THE FOUNDATION FOR JEWISH CAMPUS LIFE 800 EIGHTH STREET NW WASHINGTON, DC 200013724	NONE	PC	GENERAL FUND	200,000
THE LOUIS D BRANDEIS CENTER 1717 PENNSYLVANIA AVE NW SUITE 1025 WASHINGTON, DC 20006	NONE	PC	RMB LAW CONFERENCE	200,000
FRIENDS OF UNITED HATZALAH OF ISRAEL 208 EAST 51 STREET SUITE 303 NEW YORK, NY 10022	NONE	PC	GENERAL FUND	218,000
AMERICAN FRIENDS OF MAGEN DAVID ADOM 20 W 36ST SUITE 1100 NEW YORK, NY 10018	NONE	PC	GENERAL FUND	250,000
	NONE	PC	GENERAL FUND	250,000

AIEF-AMERICAN ISRAEL EDUCATION FUND 251 H STREET NW WASHINGTON, DC 20001	NONE	PC	GENERAL FUND	250,000
TZO HAR ISRAEL FOUNDATION 122 OAKSTREET WOODMERE, NY 11598	NONE	PC	GENERAL	254,000
PALM BEACH ORTHODOX SYNAGOGUE 120 NORTH COUNTY ROAD PALM BEACH, FL 33480	NONE	PC	SNEIOR PROGRAM & GENERAL FUND	300,000
AMERICAN SOCIETY OF THE UNIVERSITY OF HAIFA - HINC 80 BROAD ST STE 2102 NEW YORK, NY 10004	NONE	PC	GENERAL	300,000
FRIENDS OF THE ISRAEL DEFENSE FORCES 60 EAST 42ND STREET SUITE 1820 NEW YORK, NY 10165	NONE	PC	IN MEMORY OF RMB	300,000
ZAKA - SEARCH AND RESCUE 2920 AVE R BROOKLYN, NY 11229	NONE	PC	GENERAL	300,000
AMERICAN FRIENDS OF SOROKA MEDICAL CENTER 47 HAVERFORD AVE SCARSDALE, NY 10583	NONE	PC	GENERAL	310,000
AMERICAN FRIENDS OF PEACE OF MIND 1581 ROUTE 27 SUITE 201 EDISON, NJ 08817	NONE	PC	GENERAL	318,000
JEWISH FEDERATION OF GREATER HOUSTON 5603 S BRAESWOOD BLVD HOUSTON, TX 77096	NONE	PC	ISRAEL EMERGENCY FUND	400,000
ROBERT M BEREN ACADEMY 11333 CLIFFWOOD DRIVE HOUSTON, TX 770356011	NONE	PC	GENERAL FUND	400,000
AMERICA GIVES INC 228 PARK AVE S 71410 NEW YORK, NY 10003	NONE	PC	GENERAL	415,250
ROBERT M BEREN ACADEMY 11333 CLIFFWOOD DRIVE HOUSTON, TX 770356011	NONE	PC	ROBERT M BEREN SCHOLARSHIP PROGRAM	600,000
TIKVAH FUND 165 EAST 56TH STREET 4TH FLOOR NEW YORK, NY 10022	NONE	PC	GENERAL FUND	660,000
BIRTHRIGHT ISRAEL FOUNDATION 711 THIRD AVENUE 10TH FLOOR NEW YORK, NY 10017	NONE	PC	GENERAL FUND	720,000
HANDS ON TZEDAKAH INC 2901 CLINT MOORE ROAD 318 BOCA RATON, FL 33496	NONE	PC	GENERAL	785,700
JDC (AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE INC)	NONE	PC	EMERGENCY EFFORTS IN ISRAEL	800,000

220 EAST 42ND STREET SUITE 400 NEW YORK, NY 10017				
JEWISH FEDERATION OF NORTH AMERICA 575 MADISON AVENUE SUITE 703 NEW YORK, NY 10022	NONE	PC	UKRAINE	850,000
FOUNDATION FOR JEWISH CAMP INC 253 WEST 35TH STREET 4TH FLOOR NEW YORK, NY 10016	NONE	PC	IN MEMORY OF RMB	1,000,000
SINAI TEMPLE 10400 WILSHIRE BOULEVARD LOS ANGELES, CA 90024	NONE	PC	IN MEMORY OF RMB	1,000,000
PARK AVENUE SYNAGOGUE 50 EAST 87TH STREET NEW YORK, NY 10128	NONE	PC	IN MEMORY OF RMB	1,000,000
AMERICAN COMMITTEE FOR SHAARE ZEDEK 1040 AVENUE OF THE AMERICAS 23RD FLOOR NEW YORK, NY 10018	NONE	PC	OPERATION IRON SWORDS	1,000,000
UNITED ORTHODOX SYNAGOGUES OF HOUSTON 9001 GREENWILLOW ST HOUSTON, TX 77096	NONE	PC	UOS CAPITAL CAMPAIGN	1,000,000
NEFESH B'NEFESH 50 EISENHOWER DRIVE PARAMUS, NJ 07652	NONE	PC	CAPITAL CAMPAIGN	2,204,000
JEWISH FEDERATION OF PALM BEACH 1 HARVARD CIRCLE SUITE 100 WEST PALM BEACH, FL 33409	NONE	PC	ANNUAL FUND	2,750,000
JEWISH FEDERATION OF GREATER LOSANGELES 6505 WILSHIRE BLVD LOS ANGELES, CA 90048	NONE	PC	GENERAL	3,050,000
UJA FEDERATION NEW YORK 130 EAST 59TH STREET NEW YORK, NY 10022	NONE	PC	IN MEMORY OF RMB	4,000,000
COMBAT HATE 2020 BRAMBLEWOOD WICHITA, KS 67206	NONE	PC	COMBAT ANTI-SEMITISM PROGRAM / CAM ISRAEL TRIPS	4,093,050
BEREN SEA FOUNDATION 2020 N BRAMBLEWOOD WICHITA, KS 67206	NONE	PC	GENERAL FUND	4,500,000
Total			▶ 3a	37,255,526

b *Approved for future payment*

Internal Revenue Service

Name of the organization
ROBERT M BEREN FAMILY FOUNDATION INC
C/O DONNA STUCKY

Employer identification number
48-0990309

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

- 501(c)() (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization

Form 990-PF

- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

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

General Rule

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

Special Rules

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

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

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

Cat. No. 30613X

Schedule B (Form 990) (2022)

Schedule B (Form 990) (2022)

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Name of organization
ROBERT M BEREN FAMILY FOUNDATION INC
C/O DONNA STUCKY

Employer identification number
48-0990309

Part I

Contributors

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROBERT M BEREN 13840 LE MANS WAY PALM BEACH GARDENS, FL 33410	\$ 5,478,096	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Schedule B (Form 990) (2022)

Schedule B (Form 990) (2022)

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Name of organization ROBERT M BEREN FAMILY FOUNDATION INC C/O DONNA STUCKY	Employer identification number 48-0990309
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Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	PUBLICLY TRADED SECURITIES	\$ 5,478,096	2022-12-21

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	

Schedule B (Form 990) (2022)

Schedule B (Form 990) (2022)

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Name of organization ROBERT M BEREN FAMILY FOUNDATION INC	Employer identification number
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efile Public Visual Render | **ObjectID: 202333529349100453 - Submission: 2023-12-18** | **TIN: 48-0990309**

TY 2022 IRS 990 e-File Render

Name: ROBERT M BEREN FAMILY FOUNDATION INC
C/O DONNA STUCKY
EIN: 48-0990309

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held	
-				
	(e) Transfer of gift			
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held	
-				

efile Public Visual Render | ObjectId: 202333529349100453 - Submission: 2023-12-18 | TIN: 48-0990309

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2022 IRS 990 e-File Render

Name: ROBERT M BEREN FAMILY FOUNDATION INC
C/O DONNA STUCKY
EIN: 48-0990309

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
BEREN SEA FOUNDATION	2020 N BRAMBLEWOOD WICHITA, KS 67206	2021-09-14	1,000,000	TO FURTHER THE ADVANCEMENT, ENHANCEMENT, PROMOTION AND/OR WELFARE OF THE JEWISH PEOPLE.	1,000,000	NONE, TO THE KNOWLEDGE OF THE GRANTOR	MARCH 31, 2023		NO INDEPENDENT VERIFICATION WAS DEEMED NECESSARY.
BEREN SEA FOUNDATION	2020 N BRAMBLEWOOD WICHITA, KS 67206	2021-09-14	1,500,000	TO FURTHER THE ADVANCEMENT, ENHANCEMENT, PROMOTION AND/OR WELFARE OF THE JEWISH PEOPLE.	1,500,000	NONE, TO THE KNOWLEDGE OF THE GRANTOR	MARCH 31, 2023		NO INDEPENDENT VERIFICATION WAS DEEMED NECESSARY.
BEREN SEA FOUNDATION	2020 N BRAMBLEWOOD WICHITA, KS 67206	2022-07-29	3,500,000	TO FURTHER THE ADVANCEMENT, ENHANCEMENT, PROMOTION AND/OR WELFARE OF THE JEWISH PEOPLE.	3,500,000	NONE, TO THE KNOWLEDGE OF THE GRANTOR	MARCH 31, 2023		NO INDEPENDENT VERIFICATION WAS DEEMED NECESSARY.
BEREN SEA FOUNDATION	2020 N BRAMBLEWOOD WICHITA, KS 67206	2023-10-16	4,500,000	TO FURTHER THE ADVANCEMENT, ENHANCEMENT, PROMOTION AND/OR WELFARE OF THE JEWISH PEOPLE.	3,019,759	NONE, TO THE KNOWLEDGE OF THE GRANTOR	MARCH 31, 2023		NO INDEPENDENT VERIFICATION WAS DEEMED NECESSARY.
BEREN SEA FOUNDATION	2020 N BRAMBLEWOOD WICHITA, KS 67206	2019-10-22	1,350,000	TO FURTHER THE ADVANCEMENT, ENHANCEMENT, PROMOTION AND/OR WELFARE OF THE JEWISH PEOPLE.	1,350,000	NONE, TO THE KNOWLEDGE OF THE GRANTOR	MARCH 31, 2023		NO INDEPENDENT VERIFICATION WAS DEEMED NECESSARY.
BEREN SEA FOUNDATION	2020 N BRAMBLEWOOD WICHITA, KS 67206	2020-07-09	1,000,000	TO FURTHER THE ADVANCEMENT, ENHANCEMENT, PROMOTION AND/OR WELFARE OF THE JEWISH PEOPLE.	1,000,000	NONE, TO THE KNOWLEDGE OF THE GRANTOR	MARCH 31, 2023		NO INDEPENDENT VERIFICATION WAS DEEMED NECESSARY.
BEREN SEA FOUNDATION	2020 N BRAMBLEWOOD WICHITA, KS 67206	2020-07-14	1,500,000	TO FURTHER THE ADVANCEMENT, ENHANCEMENT, PROMOTION AND/OR WELFARE OF THE JEWISH PEOPLE.	1,500,000	NONE, TO THE KNOWLEDGE OF THE GRANTOR	MARCH 31, 2023		NO INDEPENDENT VERIFICATION WAS DEEMED NECESSARY.

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TY 2022 IRS 990 e-File Render

Name: ROBERT M BEREN FAMILY FOUNDATION INC
C/O DONNA STUCKY
EIN: 48-0990309

Name of Bond	End of Year Book Value	End of Year Fair Market Value
KKR & CO INC	6,454,656	5,916,720

efile Public Visual Render	ObjectID: 202333529349100453 - Submission: 2023-12-18	TIN: 48-0990309
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TY 2022 IRS 990 e-File Render

Name: ROBERT M BEREN FAMILY FOUNDATION INC
C/O DONNA STUCKY

EIN: 48-0990309

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALPHABET INC	6,086,403	5,914,160
AMERICAN TOWER CORP SHARES	3,230,675	3,118,325
APPLE INC	14,680,670	13,943,371
ASML HLDS NV NY REG SHR	5,589,084	5,089,885
AT&T INC COM	53,513	58,551
AUTOZONE INC	9,844,440	9,908,520
BERKSHIRE HATHAWAY INC.	351,196,620	328,801,385
BROADCOM INC COMMON	5,312,989	5,468,905
BROOKFIELD ASSET MGMT	3,320,000	2,915,000
COMCAST CORP	5,675,000	5,161,250
COPART INC	7,891,732	7,920,640
COSTCO WHSL CORP NEW COM	190,749	189,487
DANAHER CORP	8,010,095	6,720,700
EVOLUTION GAMING GRO	5,287,929	4,048,336
EXXON MOBIL CORP	1,700,680	1,693,600
GENERAL AMERICAN INVSTRS	4,509,458	4,351,619
HONEYWELL INTL INC	5,629,500	5,497,800
INTER CONTINENTAL EX	3,477,471	3,266,176
JOHNSON & JOHNSON	1,379,760	1,186,720
LVMH MOET HENNESSY L ORDINARY	5,740,044	4,663,048
MICROSOFT CORP	22,497,450	23,329,590
NESTLE SA-SPONSORED	7,129,800	6,465,600
NEXTERA ENERGY INC	6,810,763	4,764,080
NIKE INC CLASS B	3,839,150	3,596,950
ORACLE CORP	9,404,461	8,582,200
PHILIP MORRIS INTL INC COM	3,702,840	3,388,080
S&P GLOBAL INC COMMON	5,651,620	5,134,857
TAKE-TWO INTERACTIVE	3,463,298	3,343,750
THERMO FISHER SCIENTIFIC INC	6,543,051	5,248,286
UNITEDHEALTH GRP INC	8,081,563	8,568,960
VERIZON COMMUNICATIONS	119,389	128,576
VISA INC	4,067,930	3,996,700
WARNER BROS DISCOVERY	12,981	9,135

efile Public Visual Render | ObjectID: 202333529349100453 - Submission: 2023-12-18 | **TIN: 48-0990309****TY 2022 IRS 990 e-File Render**

Name: ROBERT M BEREN FAMILY FOUNDATION INC
 C/O DONNA STUCKY
EIN: 48-0990309

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ASCOT PARTNERS, LP	AT COST	10,762	0

efile Public Visual Render | ObjectID: 202333529349100453 - Submission: 2023-12-18 | **TIN: 48-0990309****TY 2022 IRS 990 e-File Render**

Name: ROBERT M BEREN FAMILY FOUNDATION INC
 C/O DONNA STUCKY
EIN: 48-0990309

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	1,972	0		1,972

efile Public Visual Render | ObjectID: 202333529349100453 - Submission: 2023-12-18 | **TIN: 48-0990309****TY 2022 IRS 990 e-File Render**

Name: ROBERT M BEREN FAMILY FOUNDATION INC
 C/O DONNA STUCKY
EIN: 48-0990309

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
POSTAGE & FREIGHT	365	0		0
NONDEDUCTIBLE CONTRIBUTIONS	439,103	0		0
BANK CHARGES	30	0		0
PENALTIES	10,942	0		0
OTHER PORTFOLIO FEES	4,221	0		0

efile Public Visual Render | ObjectID: 202333529349100453 - Submission: 2023-12-18 | **TIN: 48-0990309****TY 2022 IRS 990 e-File Render**

Name: ROBERT M BEREN FAMILY FOUNDATION INC
 C/O DONNA STUCKY
EIN: 48-0990309

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
STOCK BASIS STEP UP TO DATE OF DEATH VALUE	479,246,403	0	479,246,403

efile Public Visual Render	ObjectID: 202333529349100453 - Submission: 2023-12-18	TIN: 48-0990309
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TY 2022 IRS 990 e-File Render

Name: ROBERT M BEREN FAMILY FOUNDATION INC
C/O DONNA STUCKY

EIN: 48-0990309

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FIRST MANHATTAN FOREIGN FEES	0	0		0
INVESTMENT FEES	879,790	879,790		0
ASCOT - OTHER DEDUCTIONS	766	0		766
CONSULTING FEES	6,600	0		6,600

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TY 2022 IRS 990 e-File Render

Name: ROBERT M BEREN FAMILY FOUNDATION INC
C/O DONNA STUCKY

EIN: 48-0990309

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
KANSAS SECRETARY OF STATE	40	0		40
FOREIGN TAX WITHHELD	119,729	0		119,729
FEDERAL INCOME TAX	424,478	0		0