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

2023

Open to Public Inspection

For calendar year 2023, or tax year beginning 01-01-2023 , and ending 12-31-2023

Name of foundation
THE WILLIAM & LIA G POORVU FAMILY FOUNDATION

A Employer identification number
04-2651199

Number and street (or P.O. box number if mail is not delivered to street address)
PO BOX 380828

Room/suite

B Telephone number (see instructions)
(617) 576-1010

City or town, state or province, country, and ZIP or foreign postal code
CAMBRIDGE, MA 02238

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here..... ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ..... ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16)* ▶$ 132,546,257

J Accounting method: ☑ Cash ☐ Accrual ☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... ▶ ☐

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	3,250,000			
	2 Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3 Interest on savings and temporary cash investments	4,469,252	4,469,252		
	4 Dividends and interest from securities	1,032,023	1,032,023		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-2,018,881			
	b Gross sales price for all assets on line 6a _____				
	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) (attach schedule)				
	11 Other income (attach schedule)	165,585	182,025	0	
	12 **Total.** Add lines 1 through 11	6,897,979	5,683,300	0	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0	0	0	0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	17,000	0	0	17,000
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	52,157	51,838	0	0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	1,593,504	1,101,624	0	0
	24 **Total operating and administrative expenses.** Add lines 13 through 23	1,662,661	1,153,462	0	17,000
	25 Contributions, gifts, grants paid	8,831,000			8,831,000
	26 **Total expenses and disbursements.** Add lines 24 and 25	10,493,661	1,153,462	0	8,848,000
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	-3,595,682			
	b **Net investment income** (if negative, enter -0-)		4,529,838		
	c **Adjusted net income** (if negative, enter -0-)			0	

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	**(b)** Book Value	**(c)** Fair Market Value
Assets	1 Cash—non-interest-bearing	4,115,355	2,239,413	2,239,413
	2 Savings and temporary cash investments			
	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)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	128,546,237	126,826,497	130,306,844
	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)	132,661,592	129,065,910	132,546,257
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities**(add lines 17 through 22)	0	0	
Net Assets or Fund Balances	**Foundations that follow FASB ASC 958, check here** ▶ ☐ **and complete lines 24, 25, 29 and 30.**			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☑ **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	
	28 Retained earnings, accumulated income, endowment, or other funds	132,661,592	129,065,910	
	29 **Total net assets or fund balances** (see instructions)	132,661,592	129,065,910	
	30 **Total liabilities and net assets/fund balances** (see instructions)	132,661,592	129,065,910	

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	132,661,592
2	Enter amount from Part I, line 27a	2	-3,595,682
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	129,065,910
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	129,065,910

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	1231 PASS THRU ABRAMS CAPITAL PARTNERS	P		
b	LT PASS THRU ABRAMS CAPITAL PARTNERS	P		
c	ST PASS THRU ABRAMS CAPITAL PARTNERS	P		
d	ST PASS THRU BAUPOST LIMITED PARTNERSHIP	P		
e	LT PASS THRU BAUPOST LIMITED PARTNERSHIP	P		
	1231 PASS THRU BAUPOST	P		
	LT PASS THRU CITIC CAPITAL CHINA PARTNERS LP	P		
	LT PASS THRU CITIC CAPITAL CHINA PARTNERS II LP	P		
	LT PASS THRU ENERGY CAPITAL PARTNERS III	P		
	LT PASS THRU ENERGY CAPITAL PARTNERS IV	P		
	LT PASS THRU FINEPOINT CAPITAL	P		
	ST PASS THRU BROWN ADVISORY INVESTORS SI INTERNATIONAL	P		
	LT PASS THRU BROWN ADVISORY INVESTORS SI INTERNATIONAL	P		
	LT PASS THRU MCR HOSPITALITY FUND II	P		
	LT PASS THRU MCR HOSPITALITY FUND	P		
	LT PASS THRU SPT LLC	P		
	ST PASS THRU SPRUCE HOUSE	P		
	LT PASS THRU SPRUCE HOUSE	P		
	LT PASS THRU ENERGY CAPITAL PARTNERS II	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				50
b				59,049
c				11,820
d				-515,294
e				-1,960,679
				268,125
				-23,328
				-4,405
				3,216
				-984
				2,503
				688
				113,208
				14,539
				20,981
				8
				-470
				-5,473
				-2,435

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
a				50
b				59,049
c				11,820
d				-515,294
e				-1,960,679
				268,125
				-23,328
				-4,405
				3,216
				-984
				2,503
				688
				113,208
				14,539
				20,981
				8
				-470
				-5,473
				-2,435

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	-2,018,881
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), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ **(attach copy of letter if necessary–see instructions)**	1	62,965
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	62,965
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	62,965
6	Credits/Payments:		
a	2023 estimated tax payments and 2022 overpayment credited to 2023 — 6a: 143,226		
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	143,226
8	Enter any **penalty** for underpayment of estimated tax. Check here ☑ if Form 2220 is attached.	8	0
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	80,261
11	Enter the amount of line 10 to be: **Credited to 2024 estimated tax** ▶ 80,261 **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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.	1b		No
	*If the answer is "Yes" to **1a** or **1b,** attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0 **(2)** On foundation managers. ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XIV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA			
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? *If "No," attach explanation* .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	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? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶ N/A

14 The books are in care of ▶ THE FOUNDATION Telephone no. ▶ (617) 576-1010

Located at ▶ 44 BRATTLE STREET CAMBRIDGE MA ZIP+4 ▶ 02138

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

			Yes	No
16	At any time during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶ O C	16	Yes	

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)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)		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)?	1a(5)		No
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		
c	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2023?	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 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?	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 2023 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2023.)*	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 2023?	4b		No

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))?	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)		No
	(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		
c	Organizations relying on a current notice regarding disaster assistance check ▶ ☐			
d	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? *If "Yes," attach the statement required by Regulations section 53.4945–5(d).*	5d		
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? *If "Yes" to 6b, file Form 8870.*	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
LIA G POORVU P O BOX 380828 CAMBRIDGE, MA 02238	TRUSTEE 5.00	0	0	0
WILLIAM J POORVU P O BOX 380828 CAMBRIDGE, MA 02238	TRUSTEE 5.00	0	0	0

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

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

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 (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		

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

0

Part VIII- Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 . . . . . ▶	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	130,513,492
b	Average of monthly cash balances		1b	3,177,384
c	Fair market value of all other assets (see instructions)		1c	0
d	**Total** (add lines 1a, b, and c)		1d	133,690,876
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	133,690,876
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)		4	2,005,363
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3		5	131,685,513
6	**Minimum investment return.** Enter 5% (0.05) of line 5		6	6,584,276

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	6,584,276
2a	Tax on investment income for 2022 from Part V, line 5	2a 62,965		
b	Income tax for 2022. (This does not include the tax from Part V.)	2b		
c	Add lines 2a and 2b		2c	62,965
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	6,521,311
4	Recoveries of amounts treated as qualifying distributions		4	0
5	Add lines 3 and 4		5	6,521,311
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	6,521,311

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	8,848,000
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	8,848,000

Part XII **Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				6,521,311
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only			0	
b Total for prior years: 20 ___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018 2,652,799				
b From 2019 3,777,635				
c From 2020 2,501,153				
d From 2021 3,008,782				
e From 2022 2,259,954				
f **Total** of lines 3a through e	14,200,323			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ $ 8,848,000				
a Applied to 2022, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions)		0		
c Treated as distributions out of corpus (Election required—see instructions)	0			
d Applied to 2023 distributable amount				6,521,311
e Remaining amount distributed out of corpus	2,326,689			
5 Excess distributions carryover applied to 2023.	0			0
(If an amount appears in column (d), the same amount must be shown in column (a).)				
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	16,527,012			
b Prior years' undistributed income. Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions		0		
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0			
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)	2,652,799			
9 **Excess distributions carryover to 2024.** Subtract lines 7 and 8 from line 6a	13,874,213			
10 Analysis of line 9:				
a Excess from 2019 3,777,635				
b Excess from 2020 2,501,153				
c Excess from 2021 3,008,782				
d Excess from 2022 2,259,954				
e Excess from 2023 2,326,689				

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 2023, enter the date of the ruling . . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2023	**(b)** 2022	**(c)** 2021	**(d)** 2020	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed . .					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

LIA G POORVU

WILLIAM J POORVU

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

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

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business) If recipient is an individual, show any foundation manager or substantial contributor	Relationship of any foundation manager or substantial contributor to recipient	Status of recipient	Purpose of grant or contribution	Amount
See attached statement				
2LIFE COMMUNITIES SERVICES 30 WELLINGTON ROAD BRIDGETON,NJ 08302	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
ACLU FOUNDATION OF NH 18 CONCORD STREET MANCHESTER,NH 03101	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
ADOLESCENT CONSULTATION SERVICES 149 CAMBRIDGE ST CAMBRIDGE,MA 02141	NONE	PUBLIC CHARITY	ENDOWMENT - PROGRAM AND OPERATING SUPPORT	100,000
ALEXANDER TWILIGHT ACADEMY 165 N MAIN ST BRIDGEWATER,MA 02324	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
ALLIANCE FOR SOCIETY OF ARTS AND SCIENCES 136 DRYDEN RD CAMBRIDGE,MA 02141	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	200,000
AMERICAN JEWISH COMMITTEE 165 EAST 56TH STREET NEW YORK,NY 10022	NONE	PUBLIC CHARITY	TRANSITIONITIC INSTITUTE	15,000
ARCHITECTS FOUNDATION 1720 NEW YORK AVENUE WASHINGTON,DC 20006	NONE	PUBLIC CHARITY	OPERATING SUPPORT	2,500
ARNOLD ARBORETUM (HARVARD) PO BOX 43280 BOSTON,MA 02241	NONE	PUBLIC CHARITY	OPERATING SUPPORT	150,000
ASSOCIATES OF THE BOSTON PUBLIC LIBRARY 700 BOYLSTON ST BOSTON,MA 02116	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
BAND COLLEGE - FISHER CENTER PO BOX 5000 ANNANDALEONTHEHUDSON,NY 12504	NONE	PUBLIC CHARITY	FISHER CENTER	100,000
BARD COLLEGE - LONGY SCHOOL OF MUSIC C/O LONGY 37 GARDEN STREET CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	LONGY SCHOOL OF MUSIC	40,000
BEACON HOUSE PO BOX 118 BOSTON,MA 02117	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
BOSTON CAMERATA PO BOX 118 BOSTON,MA 02117	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
BOSTON COLLEGE - MCMULLEN MUSEUM OF ART 140 COMMONWEALTH AVENUE CHESTNUT HILL,MA 02467	NONE	PUBLIC CHARITY	MCMULLEN MUSEUM OF ART	5,000
BOSTON LANDMARKS ORCHESTRA 545 CONCORD AVENUE STE 318 CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
BOSTON LYRIC OPERA 11 AVENUE DE LAFAYETTE BOSTON,MA 02111	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
BOSTON PUBLIC LIBRARY FOUNDATION 700 BOYLSTON ST BOSTON,MA 02116	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
BOSTON SYMPHONY ORCHESTRA 301 MASS AVE BOSTON,MA 02115	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
BOTTOM LINE 500 AMORY ST STE 3 JAMAICA PLAIN,MA 02130	NONE	PUBLIC CHARITY	BOSTON PROGRAM	5,000
BREAKTHROUGH GREATER BOSTON 45 BIRD AVENUE CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
BRIDGE OVER TROUBLED WATERS 47 WEST ST BOSTON,MA 02111	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
BRIDGES HOMEWARD 40 GORE ST CAMBRIDGE,MA 02141	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	10,000
BROOKLINE & NEWTON CENTRAL 116 HUNTINGTON AVE 3RD FL BOSTON,MA 02116	NONE	PUBLIC CHARITY	OPERATING SUPPORT	510,000
BROAD INSTITUTE 75 AMES ST 6TH FLOOR 6023 CAMBRIDGE,MA 02142	NONE	PUBLIC CHARITY	OPERATING SUPPORT	250,000
CAMBRIDGE COMMUNITY FOUNDATION CAMBRIDGE,MA 02139	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
CAMBRIDGE HEALTH ALLIANCE FOUNDATION 220 MAIN STREET 5TH FLOOR MALDEN,MA 02148	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
CAMBRIDGE PUBLIC LIBRARY FOUNDATION 449 BROADWAY CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
CAMP JABBERWOCKY PO BOX 1207 CENTERVILLE,MA 02568	NONE	PUBLIC CHARITY	OPERATING SUPPORT	250,000
CAPE COD INSTITUTE FOR KID B & GIRLS&CO 4 INTERCHANGE CENTERVILLE,MA 02632	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
CENTERVILLE PUBLIC LIBRARY 585 MAIN ST CENTERVILLE,MA 02632	NONE	PUBLIC CHARITY	EDUCATION PROGRAM SUPPORT	25,000
CHARITIES AID FOUNDATION OF AMERICA 225 NEWMARKS LANE STE 375 ALEXANDRIA,VA 22314	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
CHILDREN UNITED 1 CHILDREN'S WAY SLINGERLANDS,NY 12159	NONE	PUBLIC CHARITY	OPERATING SUPPORT	150,000
126 HIGH ST BOSTON,MA 02110	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
CONSERVATORY LAB CHARTER SCHOOL 2120 DORCHESTER AVENUE DORCHESTER,MA 02124	NONE	PUBLIC CHARITY	OPERATING SUPPORT	15,000
CRADLES TO CRAYONS 283 WORTHMAN AVENUE BOSTON,MA 02124	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	25,000
CURE ALZHEIMER'S FOUNDATION 34 WASHINGTON ST STE 210 WELLESLEY HILLS,MA 02481	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	1,000,000
DANA FARBER CANCER INSTITUTE 10 BROOKLINE PLACE WEST BROOKLINE,MA 02445	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
DE NOVO (FKA COMMUNITY LEGAL AID AND COUNSELING CENTER) 47 THORNDIKE STREET CAMBRIDGE,MA 02141	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
DEMOCRACY 21 EDUCATION FUND 2000 MASS AVE NW WASHINGTON,DC 20036	NONE	PUBLIC CHARITY	BOSTON PROGRAM	10,000
DREAM PROGRAM THE PO BOX 301 WINDSOR,VT 05089	NONE	PUBLIC CHARITY	OPERATING SUPPORT	400,000
ECOAMERICA 1710 RHODE ISLAND AVE NW WASHINGTON,DC 20036	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
ELEANOR ROOSEVELT VAL KILL PARTNERSHIP 4097 ALBANY POST RD HYDE PARK,NY 12538	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
EVERY CAN WORK 1629 FLORIDA BLVD NEW ORLEANS,LA 70117	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
FACING HISTORY AND OURSELVES 16 HOBO RD BROOKLINE,MA 02445	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
FAMILIES FIRST PARENTING PROGRAM 50 FORT ST SUITE 100 WATERTOWN,MA 02472	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
FAMILIAD BOSTON 3815 WASHINGTON ST ROXBURY,MA 02119	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
FOOD FOR FREE 11 UNNA STREET CAMBRIDGE,MA 02139	NONE	PUBLIC CHARITY	OPERATING SUPPORT	15,000
FORT TICONDEROGA 100 FORT TI RD TICONDEROGA,NY 12883	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
FRENCH CULTURAL CENTER 53 MARLBOROUGH ST BOSTON,MA 02116	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
FRIENDS OF THE LONGWOOD COLLECTIONS 83 PINELAWN RD MELVILLE,NY 11747	NONE	PUBLIC CHARITY	OPERATING SUPPORT	15,000
FROM THE HEART PO BOX 80424 SEATTLE,WA 98104	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
GLOVER LEHRMAN INSTITUTE 40 WEST 20TH ST 11TH FL NEW YORK,NY 10011	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	100,000
GREATER BOSTON FOOD BANK 70 SOUTH BAY AVENUE BOSTON,MA 02118	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
GREATER BOSTON LEGAL SERVICES 197 MELNEA CASS BLVD BOSTON,MA 02119	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
HARVARD (ALL) 32 MT AUBURN ST CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	25,000
HARVARD UNIVERSITY 79 JFK ST BOX 109 CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	KENNEDY SCHOOL FOR WOMEN AND PUBLIC POLICY	5,000
HARVARD UNIVERSITY HOMEWARD	NONE	PUBLIC CHARITY	SHORENSTEIN CTR ON MEDIA, POLITICS & PUBLIC POLICY	500,000
29 JFK ST BOX 125 CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
HOMEWARD 185 CHARLES ST SUITE 302 BOSTON,MA 02114	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
INTERNATIONAL SCHOOL OF PRAGUE FOUNDATION 1350 AVENUE OF THE AMERICAS FL 2 6TH FLR NEW YORK,NY 10019	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	5,000
ISABELLA STEWART GARDNER MUSEUM 25 EVANS WAY BOSTON,MA 02115	NONE	PUBLIC CHARITY	OPERATING SUPPORT	199,200
JVS CHILD DEVELOPMENTAL 25 BRAMERLL ST 1265 CONCORD,NH 03301	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
JANE DOE INC PO BOX 908049 BOSTON,MA 02190	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
JEWISH WOMEN'S ARCHIVE 1 HARVARD ST SUITE 280 BROOKLINE,MA 02445	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
KEAN UNIVERSITY FOUNDATION 1000 MORRIS AVENUE UNION,NJ 07083	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
LEAP 31 JEFFERSON ST NEW HAVEN,CT 06511	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	25,000
LET'S GET READY 82 NASSAU ST 61ST FL NEW YORK,NY 10038	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
LEVYN SPOONFUL 189 WILLS AVENUE SUITE 100 MINEOLA,NY 11501	NONE	PUBLIC CHARITY	OPERATING SUPPORT	45,000
MARTHA'S VINEYARD MUSEUM 59 LAGOON POND RD VINEYARD HAVEN,MA 02568	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
MASS POETRY 15 CHANNEL CTR ST STE 103 BOSTON,MA 02210	NONE	PUBLIC CHARITY	OPERATING SUPPORT	7,500
MASSACHUSETTS HISTORICAL SOCIETY 1154 BOYLSTON ST BOSTON,MA 02215	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	25,000
MASSACHUSETTS HUMANITIES 66 BRIGGS ST NORTHAMPTON,MA 01060	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
METROPOLITAN HOUSING BOSTON 2011 THOMAS ST BOSTON,MA 02127	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
METROPOLITAN OPERA ASSOCIATION 30 LINCOLN CENTER NEW YORK,NY 10023	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
MORE THAN WORDS 56 FELTON STREET WATERTOWN,MA 02472	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
NATIONAL PUBLIC RADIO FOUNDATION 1111 NORTH CAPITOL ST NE WASHINGTON,DC 20002	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	25,000
NEW ENGLAND HISTORIC GENEALOGICAL SOCIETY 99-101 NEWBURY ST BOSTON,MA 02116	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
PARTNERS IN HEALTH 800 BOYLSTON ST SUITE 300 BOSTON,MA 02199	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	10,000
PERKINS SCHOOL FOR THE BLIND 175 NORTH BEACON ST WATERTOWN,MA 02472	NONE	PUBLIC CHARITY	OPERATING SUPPORT	7,500
PHILLIPS ACADEMY ANDOVER 180 ARGUIDE STREET ANDOVER,MA 01810	NONE	PUBLIC CHARITY	SCHOLARSHIP FUND	50,000
PLANNED PARENTHOOD OF MASSACHUSETTS 1055 COMMONWEALTH AVE BOSTON,MA 02215	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
POLLY HILL ARBORETUM PO BOX 1081 WEST TISBURY,MA 02575	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
PROJECT BREAK - THE WALK FOR HUNGER 145 BORDER STREET BOSTON,MA 02128	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	45,000
RADCLIFFE INSTITUTE FOR ADVANCED STUDY 10 GARDEN ST SUITE 300 CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	10,000
RAISING A READER 2 SCHOOL ST 4TH FLOOR BOSTON,MA 02108	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
RAZA DE UNIDAD 140 2ND AVENUE SUITE 305 NEW YORK,NY 10003	NONE	PUBLIC CHARITY	OPERATING SUPPORT	12,500
REPRODUCTIVE EQUITY NOW FOUNDATION 45 COURT ST STE 300 BOSTON,MA 02108	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
SHOUTER MUSIC BOSTON 1337 ROSS AVE 318 ARLINGTON,MA 02476	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
SILK ROAD PROJECT PO BOX 35564 BOSTON,MA 02135	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
SOCIAL INNOVATION FORUM 2 OLIVER ST 9TH FLR BOSTON,MA 02109	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
SQUASHBUSTERS 795 COLUMBUS AVENUE ROXBURY CROSSING,MA 02120	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
SUMMER SEARCH BOSTON 3840 WASHINGTON ST JAMAICA PLAIN,MA 02130	NONE	PUBLIC CHARITY	OPERATING SUPPORT	150,000
SUNFLOWER OF PEACE PO BOX 609005 NEWTON,MA 02460	NONE	PUBLIC CHARITY	OPERATING SUPPORT	12,500
TENACITY 28 EVERETT ST STE 50 BOSTON,MA 02129	NONE	PUBLIC CHARITY	OPERATING SUPPORT	15,000
THE SCHWARTZ CENTER 100 CAMBRIDGE ST 9TH FLOOR BOSTON,MA 02114	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
THRIVE SCHOOLS 75 FEDERAL ST SUITE 1250 BOSTON,MA 02110	NONE	PUBLIC CHARITY	OPERATING SUPPORT	15,000
TOBIN PROJECT INC	NONE	PUBLIC CHARITY	UNRESTRICTED OPERATING SUPPORT	35,000
TRUSTEES OF RESERVATIONS (FORMERLY DUCKBOOK) 200 HIGH ST 4TH FLOOR BOSTON,MA 02110	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	50,000
TRUSTEES OF RESERVATIONS - (NONPUBLIC DUCKBOOK) 200 HIGH ST 4TH FLOOR BOSTON,MA 02110	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
UMB FOUNDATION 1 UNIVERSITY AVENUE LOWELL,MA 01854	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	350,000
UNICOMMONWEALTH AVE 360 PL BOSTON,MA 02215	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
WELLESLEY COLLEGE 106 CENTRAL STREET WELLESLEY,MA 02481	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	200,000
WEST END HOUSE 1 WEST END HOUSE WAY BOSTON,MA 02114	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
WEST END HOUSE 1 WEST END HOUSE WAY BOSTON,MA 02114	NONE	PUBLIC CHARITY	OPERATING SUPPORT	65,000
WEST CHOP COMMUNITY FUND INC PO BOX 1 TISBURY,MA 02568	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
WGBH EDUCATIONAL FOUNDATION ONE GUEST STREET BOSTON,MA 02135	NONE	PUBLIC CHARITY	PROJECT, PROGRAM, AND OPERATING SUPPORT	150,000
WHITEHEAD INSTITUTE 455 MAIN STREET CAMBRIDGE,MA 02142	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
YALE (ALL) 60 WALL STREET NEW HAVEN,CT 06511	NONE	PUBLIC CHARITY	ENDOWMENT AND OPERATING SUPPORT	2,500,000
YALE UNIVERSITY 60 WALL STREET NEW HAVEN,CT 06511	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000

Total ▶ 8,831,200

▶ Approved for future payment

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments	531120		14		4,469,252
4 Dividends and interest from securities	531120		14		1,032,023
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income	531120				165,585
8 Gain or (loss) from sales of assets other than inventory	531120				-2,018,881
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: **a**					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		0	3,647,979
13 **Total.** Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				**13**	3,647,979

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
3	INVESTMENT INCOME
7	INVESTMENT INCOME
8	INVESTMENT INCOME
4	INVESTMENT INCOME

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		No
	(2) Other assets	1a(2)		No
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
	(3) Rental of facilities, equipment, or other assets	1b(3)		No
	(4) Reimbursement arrangements	1b(4)		No
	(5) Loans or loan guarantees	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

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

(a) Line No.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule.

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

Sign Here

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

Signature of officer or trustee	Date	Title
	2024-11-11	

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
JANET E SCOTT CPA		2024-11-11		P00301539

Firm's name ▶ WALTER SHUFFAIN PC — Firm's EIN ▶ 04-3236498

Firm's address ▶ 101 STATION DRIVE SUITE 250, WESTWOOD, MA 02090 — Phone no. (617) 447-2700

Additional Data

Return to Form

Software ID:
Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B

(Form 990)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

2023

Name of the organization	**Employer identification number**
THE WILLIAM & LIA G POORVU FAMILY FOUNDATION	04-2651199

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 33$^{1}/_{3}$% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . . ▶ $ _____

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

Name of organization
THE WILLIAM & LIA G POORVU
FAMILY FOUNDATION

Employer identification number
04-2651199

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

Contributors

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	WILLIAM J POORVU P O BOX 380828 CAMBRIDGE, M A 02238	$ 3,250,000	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
THE WILLIAM & LIA G POORVU
FAMILY FOUNDATION

Employer identification number
04-2651199

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
		$	

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

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

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

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

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

Name of organization
THE WILLIAM & LIA G POORVU FAMILY FOUNDATION

Employer identification number
04-2651199

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

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(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

(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

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

Additional Data

Return to Form

Software ID:

Software Version:

TY 2023 IRS 990 e-File Render

Name: THE WILLIAM & LIA G POORVU FAMILY FOUNDATION

EIN: 04-2651199

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	17,000	0	0	17,000

TY 2023 IRS 990 e-File Render

Name: THE WILLIAM & LIA G POORVU FAMILY FOUNDATION

EIN: 04-2651199

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ABRAMS CAPITAL PARTNERS II, LP	AT COST	2,079,801	2,077,755
BAUPOST LIMITED PARTNERSHIP 1983 C-1	AT COST	103,821,680	100,909,533
BLUE SPRUCE	AT COST	6,500,000	10,751,869
BROWN ADVISORY GLOBAL FOCUS	AT COST	1,000,000	1,233,718
BROWN ADVISTORY INVESTORS SI INTERNATIONAL LLLP	AT COST	3,483,488	3,483,488
CBL & ASSOCIATES	AT COST	1,298,150	5,632
CITIC CAPITAL CHINA PARTNERS II, LP	AT COST	319,624	258,113
ENERGY CAPITAL PARTNERS III-B, LP	AT COST	364,674	319,650
ENERGY CAPITAL PARTNRES IV-B LP	AT COST	542,497	756,156
FINEPOINT CAPITAL PARTNERS II, LP	AT COST	70,327	70,322
MCR HOSPITALITY FUND II LP	AT COST	347,031	341,652
MCR HOSPITALITY FUND LP	AT COST	310,267	310,264
NEW VERNON INDIA FUND II, LP	AT COST	1,250,000	4,063,718
SRS LONG OPPORTUNITIES	AT COST	1,000,000	1,453,277
THE ENGINE FOLLOW-ON FUND I, LP	AT COST	681,040	681,040
THE SPRUCE HOUSE PARTNERSHIP, LP	AT COST	3,350,335	3,350,335
ECP CALPINE HOLDINGS LP	AT COST	167,885	624
SPT LLC	AT COST	9	9
MCR HOSPITALITY FUND IV LP	AT COST	239,689	239,689

TY 2023 IRS 990 e-File Render

Name: THE WILLIAM & LIA G POORVU FAMILY FOUNDATION

EIN: 04-2651199

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DEDUCTIONS RELATED TO PORTFOLIO INCOME	1,585,758	1,101,624	0	0
NON-DEDUCTIBLE EXPENSES	7,746	0	0	0

TY 2023 IRS 990 e-File Render

Name: THE WILLIAM & LIA G POORVU FAMILY FOUNDATION

EIN: 04-2651199

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FROM ABRAMS CAPITAL PARTNERS	-9,784	-9,784	
FROM BAUPOST 1983 C-1	95,793	95,793	
UBTI REPORTED AS CAPITAL GAINS	-16,440	0	
CITIC CAPITAL CHINA PARTNERS II	-6	-6	
BROWN ADVISORY INVESTORS SI INTERNATIONAL LLLP	638	638	
STATE REFUNDS	29,432	29,432	
IRS REFUNDS	66,354	66,354	
MCR HOSPITALITY FUND IV	-402	-402	

TY 2023 IRS 990 e-File Render

Name: THE WILLIAM & LIA G POORVU FAMILY FOUNDATION

EIN: 04-2651199

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	319	0	0	0
FOREIGN TAXES	51,338	51,338	0	0
STATE TAXES	500	500	0	0