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

2024

Open to Public Inspection

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

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)* ▶$ 137,142,896

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)	5,000,000			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	2,787,299	2,787,299		
	4	Dividends and interest from securities	835,031	835,031		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	2,343,745			
	b	Gross sales price for all assets on line 6a 34				
	7	Capital gain net income (from Part IV, line 2)		2,343,745		
	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)	1,086,607	867,070	0	
	12	**Total.** Add lines 1 through 11	12,052,682	6,833,145	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)	35,000	0	0	35,000
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	80,641	55,641	0	0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	1,631,654	1,164,447	0	0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	1,747,295	1,220,088	0	35,000
	25	Contributions, gifts, grants paid	10,087,500			10,087,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	11,834,795	1,220,088	0	10,122,500
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	217,887			
	b	**Net investment income** (if negative, enter -0-)		5,613,057		
	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	2,239,413	12,653,798	12,653,798
	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)	126,826,497	116,629,999	124,489,098
	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)	129,065,910	129,283,797	137,142,896
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	129,065,910	129,283,797	
	29	**Total net assets or fund balances** (see instructions)	129,065,910	129,283,797	
	30	**Total liabilities and net assets/fund balances** (see instructions)	129,065,910	129,283,797	

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	129,065,910
2	Enter amount from Part I, line 27a	2	217,887
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	129,283,797
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	129,283,797

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	ST PASS THRU BAUPOST LIMITED PARTNERSHIP	P		
b	LT PASS THRU BAUPOST LIMITED PARTNERSHIP	P		
c	1231 PASS THRU BAUPOST LIMITED PARTNERSHIP	P		
d	LT PASS THRU ENERGY CAPITAL PARTNERS II-B	P		
e	ST PASS THRU SPRUCE HOUSE	P		
	LT PASS THRU SPRUCE HOUSE	P		
	LT PASS THRU MCR HOSPITALITY FUND	P		
	1231 PASS THRU ABRAMS CAPITAL PARTNERS	P		
	LT PASS THRU ABRAMS CAPTIAL PARTNERS	P		
	ST PASS THRU ABRAMS CAPITAL PARTNERS	P		
	LT PASS THRU CITIC CAPITAL CHINA PARTNERS II, LP	P		
	ST PASS THRU BROWN ADVISORS INVESTORS SI INTERNATIONAL	P		
	LT PASS THRU BROWN ADVISORY INVESTORS SI INTERNATIONAL	P		
	LT PASS THRU SPT LLC	P		
	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				518,237
b				1,229,686
c				149,481
d				-99,681
e				-1,455
				292,248
				3,583
				2,094
				42,378
				-27,873
				-26,963
				7,369
				254,563
				44
	34			34

	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				518,237
b				1,229,686
c				149,481
d				-99,681
e				-1,455
				292,248
				3,583
				2,094
				42,378
				-27,873
				-26,963
				7,369
				254,563
				44
				34

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	2,343,745
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	78,021
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	78,021
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	78,021
6	Credits/Payments:				
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	65,261		
b	Exempt foreign organizations—tax withheld at source	6b	0		
c	Tax paid with application for extension of time to file (Form 8868)	6c	30,000		
d	Backup withholding erroneously withheld	6d	0		
7	Total credits and payments. Add lines 6a through 6d			7	95,261
8	Enter any **penalty** for underpayment of estimated tax. Check here ☑ if Form 2220 is attached.			8	375
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	16,865
11	Enter the amount of line 10 to be: **Credited to 2025 estimated tax** ▶ 16,865	**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		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *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 2024 or the taxable year beginning in 2024? 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? Website address ▶ N/A	13	Yes	
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		
16	At any time during calendar year 2024, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶ O C	16	Yes	No

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(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 2024?	1d		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024?	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 2024 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2024.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2024?	4b		No

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

			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?	5d		
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to 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?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	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	127,382,262
b	Average of monthly cash balances			1b	7,416,231
c	Fair market value of all other assets (see instructions)			1c	0
d	**Total** (add lines 1a, b, and c)			1d	134,798,493
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	134,798,493
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)			4	2,021,977
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3			5	132,776,516
6	**Minimum investment return.** Enter 5% (0.05) of line 5			6	6,638,826

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	6,638,826
2a	Tax on investment income for 2024 from Part V, line 5	2a	78,021		
b	Income tax for 2024. (This does not include the tax from Part V.)	2b			
c	Add lines 2a and 2b			2c	78,021
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	6,560,805
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	6,560,805
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	6,560,805

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	10,122,500
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part XII, line 4	4	10,122,500

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7				6,560,805
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.			0	
b Total for prior years: 20 ___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2024:				
a From 2019. 3,777,635				
b From 2020. 2,501,153				
c From 2021. 3,008,782				
d From 2022. 2,259,954				
e From 2023. 2,326,689				
f **Total** of lines 3a through e	13,874,213			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ $ 10,122,500				
a Applied to 2023, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2024 distributable amount				6,560,805
e Remaining amount distributed out of corpus	3,561,695			
5 Excess distributions carryover applied to 2024. *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0			0
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	17,435,908			
b Prior years' undistributed income. Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount —see instructions		0		
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				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 2019 not applied on line 5 or line 7 (see instructions) . . .	3,777,635			
9 **Excess distributions carryover to 2025.** Subtract lines 7 and 8 from line 6a	13,658,273			
10 Analysis of line 9:				
a Excess from 2020 2,501,153				
b Excess from 2021 3,008,782				
c Excess from 2022. . . . 2,259,954				
d Excess from 2023 2,326,689				
e Excess from 2024 3,561,695				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2024	**(b)** 2023	**(c)** 2022	**(d)** 2021	
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 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 relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
2LIFE COMMUNITIES SERVICES 30 WALLINGFORD ROAD BRIGHTON,MA 02135	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
ACCELERATE CHANGE INC 2594 WASHINGTON ST SUITE 500 BOSTON,MA 02135	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
ACLU FOUNDATION OF MA ONE CENTER PLAZA SUITE 850 BOSTON,MA 02108	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
ADOLESCENT CONSULTATION SERVICES 189 CAMBRIDGE ST CAMBRIDGE,MA 02141	NONE	PUBLIC CHARITY	ENDOWMENT - PROGRAM AND OPERATING SUPPORT	100,000
ALEXANDER TWILIGHT ACADEMY 195 W NEWTON ST 2 BOSTON,MA 02116	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
AMERICAN ACADEMY OF ARTS AND SCIENCES 136 IRVING ST CAMBRIDGE,MA 02141	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	200,000
AMERICAN ANCESTORS 99-101 NEWBURY ST BOSTON,MA 02116	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	10,000
AMERICAN INDEPENDENT FOUNDATION 800 MAINE AVE SW STE 500 WASHINGTON DC,DC 20024	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
AMERICAN JEWISH COMMITTEE 165 EAST 56TH STREET NEW YORK,NY 10022	NONE	PUBLIC CHARITY	TRANSATLANTIC INSTITUTE	25,000
ARCHITECHTS FOUNDATION 1735 NEW YORK AVENUE WASHINGTON,DC 20006	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	2,500
ARNOLD ARBORETUM (HARVARD) PO BOX 419209 BOSTON,MA 02241	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	50,000
ASSOCIATES OF THE BOSTON PUBLIC LIBRARY 700 BOYLSTON ST BOSTON,MA 02116	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
BARD COLLEGE - FISHER CENTER PO BOX 5000 ANNANDALEONTHEHUDSO,NY 12504	NONE	PUBLIC CHARITY	FISHER CENTER	100,000
BARD COLLEGE - LONGY SCHOOL OF MUSIC C/O LONGY 27 GARDEN STREET CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	LONGY SCHOOL OF MUSIC	40,000
BOSTON AREA GLEANERS 91 MARTIN ST ACTON,MA 01720	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
BOSTON BAROQUE 10 GUEST ST SUITE 290 BOSTON,MA 02135	NONE	PUBLIC CHARITY	OPERATING SUPPORT	75,000
BOSTON BOOK FESTIVAL 720 MASSACHUSETTS AVE SUITE 8 CAMBRIDGE,MA 02139	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
BOSTON BY FOOT 87 MOUNT VERNON ST BOSTON,MA 02108	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	10,000
BOSTON CAMERATA PO BOX 120751 BOSTON,MA 02112	NONE	PUBLIC CHARITY	OPERATING SUPPORT	45,000
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	10,000
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 101 ROGERS ST S CAMBRIDGE,MA 02142	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 60 GORE ST CAMBRIDGE,MA 02141	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
BRIGHAM & WOMEN'S HOSPITAL 116 HUNTINGTON AVE 3RD FL BOSTON,MA 02116	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	510,000
BROAD INSTITUTE 75 AMES ST ROOM 6023 CAMBRIDGE,MA 02142	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	200,000
CAMBRIDGE CENTER FOR ADULT EDUCATION 42 BRATTLE STREET CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
CAMBRIDGE COMMUNITY FOUNDATION 99 BISHOP ALLEN DRIVE UNIT 115 CAMBRIDGE,MA 02139	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
CAMBRIDGE HEALTH ALLIANCE FOUNDATION 350 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	25,000
CAMP JABBERWOCKY PO BOX 1357 VINEYARD HAVEN,MA 02568	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
CENTERVILLE PUBLIC LIBRARY 585 MAIN ST CENTERVILLE,MA 02632	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
CENTRAL SYNAGOGUE 123 EAST 55TH STREET NEW YORK,NY 10022	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
CHARITIES AID FOUNDATION OF AMERICA 225 REINEKERS LANE STE 375 ALEXANDRIA,VA 22314	NONE	PUBLIC CHARITY	EDUCATION PROGRAM SUPPORT	25,000
COMBINED JEWISH PHILANTHROPIES 126 HIGH ST BOSTON,MA 02110	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	150,000
CONSERVATORY LAB CHARTER SCHOOL 2120 DORCHESTER AVENUE BOSTON,MA 02124	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
CRADLES TO CRAYONS 281 NEWTONVILLE AVENUE NEWTON,MA 02460	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	50,000
CURE ALZHEIMER'S FOUNDATION 34 WASHINGTON ST STE 310 WELLESLEY HILLS,MA 02481	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
DANA-FARBER CANCER INSTITUTE 10 BROOKLINE PLACE WEST BROOKLINE,MA 02445	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	1,000,000
DE NOVO (FKA COMMUNITY LEGAL SERVICES AND COUNSELING CENTER) 47 THORNDIKE STREET CAMBRIDGE,MA 02141	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
DEMOCRACY 21 EDUCATION FUND 2000 MASS AVE NW WASHINGTON,DC 20036	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
DREAM PROGRAM THE PO BOX 361 WINOOSKI,VT 05404	NONE	PUBLIC CHARITY	BOSTON PROGRAM	10,000
ECOAMERICA 1730 RHODE ISLAND AVE NW WASHINGTON,DC 20036	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	1,100,000
ELEANOR ROOSEVELT VAL-KILL PARTNERSHIP 4097 ALBANY POST RD HYDE PARK,NY 12538	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
EQUIS INSTITUTE 1728 OCEAN AVENUE PMB 171 SAN FRANCISCO,CA 94112	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
EVERY1 CAN WORK 9639 FAIRFAX BLVD FAIRFAX,VA 22031	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
FACING HISTORY AND OURSELVES 16 HURD RD BROOKLINE,MA 02445	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
FAMILIES FIRST PARENITNG PROGRAMS INC 50 HUNT ST SUITE 300 WATERTOWN,MA 02472	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
FAMILYAID BOSTON 3815 WASHINGTON ST BOSTON,MA 02130	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
FILMMAKERS COLLABORATIVE 145 NINTH STREET 310 SAN FRANCISCO,CA 94103	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	15,000
FOOD FOR FREE 59 INNER BELT RD SOMERVILLE,MA 02143	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
FORT TICONDEROGA 100 FORT TI RD TICONDEROGA,NY 12883	NONE	PUBLIC CHARITY	OPERATING SUPPORT	20,000
FRENCH CULTURAL CENTER 53 MARLBOROUGH ST BOSTON,MA 02116	NONE	PUBLIC CHARITY	OPERATING SUPPORT	15,000
FRIENDS OF THE LOBKOWICZ COLLECTIONS PO BOX 814 DOVER,MA 02030	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
FROM THE TOP PO BOX 845429 BOSTON,MA 02284	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
GILDER LEHRMAN INSTITUTE 49 WEST 45TH ST 2ND FL NEW YORK,NY 10036	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	350,000
GLOBAL IMPACT 1199 N FAIRFAX ST SUITE 300 ALEXANDRIA,VA 22314	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	25,000
GREATER BOSTON FOOD BANK 70 SOUTH BAY AVENUE BOSTON,MA 02118	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
GREATER BOSTON LEGAL SERVICES 197 FRIEND STREET BOSTON,MA 02114	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
HARVARD HILLEL 52 MT AUBURN ST CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	10,000
HARVARD UNIVERSITY 48 QUINCY STREET CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	GRADUATE SCHOOL OF DESIGN	250,000
HARVARD UNIVERSITY 79 JFK ST BOX 100 CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	KENNEDY SCHOOL FOR WOMEN AND PUBLIC POLICY	5,000
HARVARD UNIVERSITY 79 JFK ST BOX 123 CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	SHORENSTEIN CTR ON MEDIA, POLITICS & PUBLIC POLICY	500,000
HIAS PO BOX 97077 WASHINGTON,DC 20090	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
HOMESMART 105 CHAUNCY ST SUITE 502 BOSTON,MA 02111	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
HOPEWELL FUND PO BOX 38068 BALTIMORE,MD 21297	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	25,000
ISABELLA STEWART GARDNER MUSEUM 25 EVANS WAY BOSTON,MA 02115	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	100,000
ISLAND HOUSING TRUST CORP 49 STATE RD UNIT 20 VINEYARD HAVEN,MA 02568	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
IVY CHILD INTERNATIONAL 35 BEHARRELL ST 1265 CONCORD,MA 01742	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
JANE DOE INC PO BOX 960849 BOSTON,MA 02196	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
JEWISH WOMEN'S ARCHIVE 1 HARVARD ST SUITE 200 BROOKLINE,MA 02445	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
KEAN UNIVERSITY FOUNDATION 1000 MORRIS AVENUE UNION,NJ 07083	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	10,000
LEAP 31 JEFFERSON ST NEW HAVEN,CT 06511	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
LOVIN' SPOONFULLS 189 WELLS AVENUE SUITE 100 NEWTON,MA 02459	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
MARTHA'S VINEYARD MUSEUM 151 LAGOON POND RD VINEYARD HAVEN,MA 02568	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
MASS POETRY 15 CHANNEL CTR ST STE 103 BOSTON,MA 02210	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
MASSACHUSETTS HISTORICAL SOCIETY 1154 BOYLSTON ST BOSTON,MA 02215	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	50,000
MASSACHUSETTS HUMANITIES 66 BRIDGE ST NORTHAMPTON,MA 01060	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
METROPOLITAN HOUSING BOSTON 1411 TREMONT ST BOSTON,MA 02120	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
METROPOLITAN OPERA ASSOCIATION 30 LINCOLN CENTER NEW YORK,NY 10023	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	30,000
MORE THAN WORDS 56 FELTON STREET WALTHAM,MA 02453		PUBLIC CHARITY	OPERATING SUPPORT	10,000
NATIONAL PUBLIC RADIO FOUNDATION 1111 NORTH CAPITOL ST NE WASHINGTON,DC 20002	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	PROGRAM SUPPORT	10,000
PHILANTHROPY MASSACHUSETTS 133 FEDERAL ST SUITE 802 BOSTON,MA 02110	NONE	PUBLIC CHARITY	SUMMER FUND	25,000
PHILLIPS ACADEMY ANDOVER 180 ANDOVER 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	25,000
POLLY HILL ARBORETUM PO BOX 561 WEST TISBURY,MA 02575	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
PROJECT BREAD - THE WALK FOR HUNGER 145 BORDER STREET BOSTON,MA 02128	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
RADCLIFFE INSTITUTE FOR ADVANCED STUDIES 10 GARDEN ST SUITE 300 CAMBRIDGE,MA 02138	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	10,000
RAISING A READER 3 SCHOOL ST 3RD FLOOR BOSTON,MA 02108	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
RAZOM FOR UKRAINE 140 2ND AVENUE SUITE 305 NEW YORK,NY 10003	NONE	PUBLIC CHARITY	OPERATING SUPPORT	15,000
REPRODUCTIVE EQUITY NOW FOUNDATION ONE FEDERAL ST FLOOR 5 BOSTON,MA 02108	NONE	PUBLIC CHARITY	OPERATING SUPPORT	25,000
ROCKEFELLER UNIVERSITY 1230 YORK AVENUE BOX 164 NEW YORK,NY 10065	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	25,000
SHELTER MUSIC BOSTON 1337 MASS AVE 116 ARLINGTON,MA 02476	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
SILK ROAD PROJECT PO BOX 35460 BRIGHTON,MA 02135	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
SPORTSMEN'S TENNIS CLUB 950 BLUE HILL AVENUE DORCHESTER,MA 02124	NONE	PUBLIC CHARITY	CAPITAL 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	100,000
SUNFLOWER OF PEACE PO BOX 600680 NEWTON,MA 02460	NONE	PUBLIC CHARITY	OPERATING SUPPORT	15,000
TENACITY 38 EVERETT ST STE 50 BOSTON,MA 02134	NONE	PUBLIC CHARITY	OPERATING SUPPORT	15,000
THE SCHWARTZ CENTER 100 CAMBRIDGE ST STE 2100 BOSTON,MA 02114	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	15,000
THRIVE SCHOLARS 75 FEDERAL ST SUITE 1250 BOSTON,MA 02110	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	15,000
TIDES FOUNDATION PO BOX 889389 LOS ANGELES,CA 90088	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	25,000
TSNE MISSIONWORKS - INTEGRITY INITIATIVES INTERNATIONAL 89 SOUTH ST STE 700 BOSTON,MA 02111	NONE	PUBLIC CHARITY	INTERGRITY INITIATIVES INTERNATIONAL	50,000
VILNA SHUL 18 PHILLIPS STREET BOSTON,MA 02114	NONE	PUBLIC CHARITY	OPERATING SUPPORT	20,000
VINEYARD HAVEN PUBLIC LIBRARY BUILDING FOUNDATION PO BOX 4961 VINEYARD HAVEN,MA 02568	NONE	PUBLIC CHARITY	OPERATING SUPPORT	5,000
WBUR 890 COMMONWEALTH AVE 3RD FL BOSTON,MA 02215	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	600,000
WELLESLEY COLLEGE 106 CENTRAL STREET WELLESLEY,MA 02381	NONE	PUBLIC CHARITY	PROGRAM AND OPERATING SUPPORT	260,000
WEST CHOP COMMUNITY FUND INC PO BOX 2009 TISBURY,MA 02568	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000
WGBH EDUCATIONAL FOUNDATION ONE GUEST STREET BOSTON,MA 02135	NONE	PUBLIC CHARITY	PROJECT, PROGRAM, AND OPERATING SUPPORT	50,000
WHITEHEAD INSTITUTE 455 MAIN STREET CAMBRIDGE,MA 02142	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
WORLD CENTRAL KITCHEN PO BOX 965538 WASHINGTON,DC 20090	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	25,000
YALE HILLEL 80 WALL STREET NEW HAVEN,CT 06511	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000
YALE UNIVERSITY PO BOX 2038 NEW HAVEN,CT 06521	NONE	PUBLIC CHARITY	ENDOWMENT AND OPERATING SUPPORT	2,505,000
Total . . . . . ▶ **3a**				10,087,500
b *Approved for future payment*				
Total . . . . . ▶ **3b**				0

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		2,791,549
4 Dividends and interest from securities	531120		14		835,065
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				1,086,607
8 Gain or (loss) from sales of assets other than inventory	531120				2,343,745
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	7,056,966
13 **Total.** Add line 12, columns (b), (d), and (e).				**13**	7,056,966

(See worksheet in line 13 instructions to verify calculations.)

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 2025-11-14 — ▶ Title

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		2025-11-13		P00301539

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

Firm's address ▶ ONE INTERNATIONAL PLACE SUITE 1010 BOSTON, MA 021102602 — 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)
(Rev. January 2025)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

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

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	WILLIAM J POORVU P O BOX 380828 CAMBRIDGE, M A 02238	$ 5,000,000	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

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 2024 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	35,000	0	0	35,000

TY 2024 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	2,092,224	2,090,133
BAUPOST LIMITED PARTNERSHIP 1983 C-1	AT COST	92,902,552	91,736,937
BLUE SPRUCE	AT COST	6,500,000	12,474,425
BROWN ADVISORY GLOBAL FOCUS	AT COST	1,000,000	1,499,821
BROWN ADVISTORY INVESTORS SI INTERNATIONAL LLLP	AT COST	3,869,981	3,869,981
CBL & ASSOCIATES	AT COST	1,298,150	7,176
CITIC CAPITAL CHINA PARTNERS II, LP	AT COST	179,795	118,284
ENERGY CAPITAL PARTNERS III-B, LP	AT COST	208,064	194,459
ENERGY CAPITAL PARTNRES IV-B LP	AT COST	637,670	851,329
FINEPOINT CAPITAL PARTNERS II, LP	AT COST	72,420	72,415
MCR HOSPITALITY FUND II LP	AT COST	375,924	370,545
MCR HOSPITALITY FUND LP	AT COST	275,316	275,313
NEW VERNON INDIA FUND II, LP	AT COST	1,250,000	4,592,185
SRS LONG OPPORTUNITIES	AT COST	1,000,000	1,505,497
THE ENGINE FOLLOW-ON FUND I, LP	AT COST	806,729	806,729
THE SPRUCE HOUSE PARTNERSHIP, LP	AT COST	3,586,539	3,586,539
ECP CALPINE HOLDINGS LP	AT COST	167,261	0
SPT LLC	AT COST	55	55
MCR HOSPITALITY FUND IV LP	AT COST	235,295	235,295
EQUAL OPPORTUNITY VENTURES FUND III LP	AT COST	98,453	128,453
THE ENGINE FUND III LP	AT COST	73,571	73,527

TY 2024 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	1,613,968	1,164,447	0	0
NON-DEDUCTIBLE EXPENSES	17,686	0	0	0

TY 2024 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	-4,242	-4,242	
FROM BAUPOST 1983 C-1	504,882	504,882	
UBTI REPORTED AS CAPITAL GAINS	219,537	0	
CITIC CAPITAL CHINA PARTNERS II	22	22	
BROWN ADVISORY INVESTORS SI INTERNATIONAL LLLP	917	917	
STATE REFUNDS	22,658	22,658	
IRS REFUNDS	342,658	342,658	
ENERGY CAPITAL PARTNERS III-B	-7	-7	
SPRUCE HOUSE	182	182	

TY 2024 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	25,000	0	0	0
FOREIGN TAXES	55,141	55,141	0	0
STATE TAXES	500	500	0	0