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 SIMONS FOUNDATION INC

A Employer identification number
13-3794889

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
160 FIFTH AVENUE 7TH FLOOR

B Telephone number (see instructions)
(646) 654-0066

City or town, state or province, country, and ZIP or foreign postal code
NEW YORK, NY 10010

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)* ▶$ 4,482,291,699

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)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	6,099,656	5,968,532		
	4	Dividends and interest from securities				
	5a	Gross rents	2,746,524	437,967		
	b	Net rental income or (loss) -5,872,387				
	6a	Net gain or (loss) from sale of assets not on line 10	53,566,107			
	b	Gross sales price for all assets on line 6a 49,721,522				
	7	Capital gain net income (from Part IV, line 2)		40,236,585		
	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)	108,988,673	127,575,172	5,806	
	12	**Total.** Add lines 1 through 11	171,400,960	174,218,256	5,806	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	2,995,813	449,372	0	2,546,441
	14	Other employee salaries and wages	76,626,507	132,476	0	76,747,988
	15	Pension plans, employee benefits	27,079,282	46,367	0	27,231,747
	16a	Legal fees (attach schedule)	799,645	11,610	0	717,991
	b	Accounting fees (attach schedule)	318,830	161,098	0	217,997
	c	Other professional fees (attach schedule)	3,577,987	913,371	0	2,637,429
	17	Interest	1,307	2,619,784	0	0
	18	Taxes (attach schedule) (see instructions)	5,438,440	281,275	0	0
	19	Depreciation (attach schedule) and depletion	33,494,984	437,967	0	
	20	Occupancy	27,356,448	0	0	22,319,498
	21	Travel, conferences, and meetings	23,451,536	0	0	22,962,054
	22	Printing and publications	2,522,397	0	0	2,456,070
	23	Other expenses (attach schedule)	54,338,125	3,186,252	5,806	51,811,332
	24	**Total operating and administrative expenses.** Add lines 13 through 23	258,001,301	8,239,572	5,806	209,648,547
	25	Contributions, gifts, grants paid	106,992,186			271,958,633
	26	**Total expenses and disbursements.** Add lines 24 and 25	364,993,487	8,239,572	5,806	481,607,180
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-193,592,527			
	b	**Net investment income** (if negative, enter -0-)		165,978,684		
	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	7,816,656	7,573,157	7,573,157
	2	Savings and temporary cash investments	140,001,005	112,937,431	112,937,431
	3	Accounts receivable ▶ 21,374			
		Less: allowance for doubtful accounts ▶	15,043	21,374	21,374
	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	6,648,186	5,606,364	5,606,364
	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)	3,922,354,215	3,852,980,099	3,852,980,099
	14	Land, buildings, and equipment: basis ▶ 659,023,012			
		Less: accumulated depreciation (attach schedule) ▶ 176,148,260	489,189,383	482,874,752	482,874,752
	15	Other assets (describe ▶)	21,077,988	20,298,522	20,298,522
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	4,587,102,476	4,482,291,699	4,482,291,699
Liabilities	17	Accounts payable and accrued expenses	11,962,741	13,514,289	
	18	Grants payable	527,390,970	367,777,715	
	19	Deferred revenue	178,916	147,681	
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)	188,664,894	188,643,031	
	22	Other liabilities (describe ▶)	192,934,413	197,475,414	
	23	**Total liabilities**(add lines 17 through 22)	921,131,934	767,558,130	
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	3,665,970,542	3,714,733,569	
	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			
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds			
	29	**Total net assets or fund balances** (see instructions)	3,665,970,542	3,714,733,569	
	30	**Total liabilities and net assets/fund balances** (see instructions)	4,587,102,476	4,482,291,699	

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	3,665,970,542
2	Enter amount from Part I, line 27a	2	-193,592,527
3	Other increases not included in line 2 (itemize) ▶	3	242,929,393
4	Add lines 1, 2, and 3	4	3,715,307,408
5	Decreases not included in line 2 (itemize) ▶	5	573,839
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	3,714,733,569

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	FUND-OF-FUND INVESTMENT SALE - FUND #3	P		
b	SHORT-TERM CAPITAL LOSS FROM LPS	P		
c	LONG-TERM CAPITAL GAIN FROM LPS	P		
d	SECTION 1231 GAIN FROM LPS	P		
e	LESS SHORT-TERM CAPITAL GAIN FROM UBTI	P		
	LESS LONG-TERM CAPITAL LOSS FROM UBTI	P		
	LESS 1231 FROM GAIN FROM UBIT	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	37,814		382,896	-345,082
b			6,348,871	-6,348,871
c	49,094,081			49,094,081
d	589,627			589,627
e			31,117	-31,117
			2,249,352	-2,249,352
			472,701	-472,701

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				-345,082
b				-6,348,871
c				49,094,081
d				589,627
e				-31,117
				-2,249,352
				-472,701

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	40,236,585
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	40,236,585

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	2,307,104
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	2,307,104
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	2,307,104
6	Credits/Payments:				
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	1,650,000		
b	Exempt foreign organizations—tax withheld at source	6b	0		
c	Tax paid with application for extension of time to file (Form 8868)	6c	266,000		
d	Backup withholding erroneously withheld	6d	0		
7	Total credits and payments. Add lines 6a through 6d			7	1,916,000
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	391,104
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	
11	Enter the amount of line 10 to be: **Credited to 2025 estimated tax** ▶	**Refunded** ▶		11	

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) ▶ CA, DE, NY			
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	Yes	
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 ▶ WWW.SIMONSFOUNDATION.ORG

14 The books are in care of ▶ MARLOW KEE Telephone no. ▶ (646) 654-0066

Located at ▶ 160 FIFTH AVENUE 7TH FLOOR NEW YORK NY ZIP+4 ▶ 10010

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 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?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

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

			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)	Yes	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes	
	(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		No
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)	Yes	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)		No
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		No
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	Yes	
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
MARILYN SIMONS 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	CO-CHAIR OF THE BOARD 16.00	0	0	0
JAMES SIMONS 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	CO-CHAIR (THRU 5/2024) 16.00	0	0	0
DAVID EISENBUD 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE 1.00	18,000	12,750	0
EMERY N BROWN 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE 1.00	20,000	0	0
PETER LITTLEWOOD 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE 1.00	20,000	11,400	0
ANDREW GOLDEN 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE (AS OF 6/2024) 1.00	0	0	0
SHIRLEY M TILGHMAN 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE/VICE CHAIR 1.00	18,000	0	0
WILLIAM H PRESS 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE 1.00	17,000	15,000	0
CORNELIA BARGMANN 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE 1.00	19,000	15,000	0
JILL PIPHER 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE (AS OF 10/2024) 1.00	0	0	0
INGRID DAUBECHIES 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE 1.00	15,000	15,000	0
BILL FORD 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	TRUSTEE (AS OF 6/2024) 1.00	0	0	0
DAVID SPERGEL 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	PRESIDENT 40.00	928,564	61,577	0
EUAN ROBERTSON 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	COO 40.00	629,645	81,042	0
MARLOW KEE 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	CFO/TREASURER 40.00	510,428	66,329	0
BRETT DAKIN 160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	GEN. COUNSEL/SEC./CHIEF COMPL. OFF. 40.00	455,750	66,329	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
KELSEY MARTIN 160 FIFTH AVENUE 7TH FLOOR NEW YORK,NY 10010	EXEC. VP, AUTISM AND 40.00	877,076	66,329	0
LESLIE GREENGARD 160 FIFTH AVENUE 7TH FLOOR NEW YORK,NY 10010	SCIENTIFIC DIR., CCM 40.00	762,743	66,329	0
JULIANNE DALCANTON 160 FIFTH AVENUE 7TH FLOOR NEW YORK,NY 10010	CENTER DIRECTOR, FLA 40.00	748,003	81,042	0
IAN FISK 160 FIFTH AVENUE 7TH FLOOR NEW YORK,NY 10010	DIR, SCIENTIFIC COMP 40.00	640,268	81,042	0
MARION CARLSON 160 FIFTH AVENUE 7TH FLOOR NEW YORK,NY 10010	EXECUTIVE VP, LIFE S 40.00	646,003	66,329	0
Total number of other employees paid over $50,000. . . . . ▶				483

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
BROAD CLINICAL LABORATORIES LLC 415 MAIN STREET CAMBRIDGE,MA 02142	GENETIC SEQUENCING SERVICES	3,366,450
TEMPUS DYNAMICS LLC 302 TULANE CT CHURCHVILLE,MD 20128	PROGRAM CONSULTING	1,956,680
SAMPLED 30 KNIGHTSBRIDGE RD STE 3 PICATAWAY,NJ 08854	GENETIC SEQUENCING SERVICES	1,522,394
DNA GENOTEK INC 3000 - 500 PALLADIUM DRIVE OTTAWA ONTARIO ONK2V 1C2 CA	GENETIC SEQUENCING SERVICES	1,267,032
PREVENTIONGENETICS LLC 3800 SOUTH BUSINESS PARK AVE MARSHFIELD,WI 54449	GENETIC SEQUENCING SERVICES	1,102,235

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

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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 FLATIRON INSTITUTE - THE FLATIRON INSTITUTE IS AN IN-HOUSE RESEARCH DIVISION OF THE SIMONS FOUNDATION ADVANCING SCIENTIFIC RESEARCH THROUGH COMPUTATIONAL METHODS, INCLUDING DATA ANALYSIS, THEORY, MODELING, AND SIMULATION.	82,382,580
2 AUTISM AND NEUROSCIENCE RESEARCH - THE SIMONS FOUNDATION AUTISM RESEARCH INITIATIVE SEEKS TO IMPROVE UNDERSTANDING, DIAGNOSIS, AND TREATMENT OF AUTISM SPECTRUM DISORDERS BY FUNDING INNOVATIVE RESEARCH OF THE HIGHEST QUALITY AND RELEVANCE.	17,862,504
3 SCIENCE, SOCIETY, & CULTURE - TO PROVIDE OPPORTUNITIES FOR PEOPLE TO FORGE A CONNECTION TO SCIENCE - WHETHER FOR THE FIRST TIME OR A LIFETIME. THROUGH THE INITIATIVES, THE FOUNDATION WORKS TO INSPIRE A FEELING OF AWE AND WONDER, FOSTER CONNECTIONS BETWEEN PEOPLE AND SCIENCE, AND SUPPORT ENVIRONMENTS THAT PROVIDE A SENSE OF BELONGING.	21,641,791
4 MPS SYMPOSIA - THE SIMONS FOUNDATIONS'S MATHEMATICS AND PHYSICAL SCIENCES (MPS) DIVISION HOSTS THE SIMONS SYMPOSIA SERIES, WHICH CONVENES MATHEMATICIANS, THEORETICAL PHYSICISTS, AND THEORETICAL COMPUTER SCIENTISTS IN A SEQUENCE OF THREE SYMPOSIA OVER A SIX-YEAR PERIOD, FOCUSED ON A SPECIFIC TOPIC OR A CLOSELY CONNECTED GROUP OF TOPICS. THESE EVENTS ARE DESIGNED TO FOSTER DEEP COLLABORATION AND INTELLECTUAL EXCHANGE.	2,628,647

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 N/A	0
2	
All other program-related investments. See instructions. 3	0
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	3,933,783,627
b	Average of monthly cash balances			1b	115,315,696
c	Fair market value of all other assets (see instructions)			1c	105,685,000
d	**Total** (add lines 1a, b, and c)			1d	4,154,784,323
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	78,030,000
3	Subtract line 2 from line 1d			3	4,076,754,323
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)			4	61,151,315
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3			5	4,015,603,008
6	**Minimum investment return.** Enter 5% (0.05) of line 5			6	200,780,150

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	200,780,150
2a	Tax on investment income for 2024 from Part V, line 5	2a	2,307,104		
b	Income tax for 2024. (This does not include the tax from Part V.)	2b	306,331		
c	Add lines 2a and 2b			2c	2,613,435
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	198,166,715
4	Recoveries of amounts treated as qualifying distributions			4	5,153,192
5	Add lines 3 and 4			5	203,319,907
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	203,319,907

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	481,607,180
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	23,944,732
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	505,551,912

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				203,319,907
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. 144,124,808				
b From 2020. 274,875,861				
c From 2021. 264,463,781				
d From 2022. 271,562,776				
e From 2023. 289,054,730				
f **Total** of lines 3a through e	1,244,081,956			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ $ 505,551,912				
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).	4,227,515			
d Applied to 2024 distributable amount				203,319,907
e Remaining amount distributed out of corpus	298,004,490			
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	1,546,313,961			
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)	4,227,515			
8 Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions) . . .	144,124,808			
9 **Excess distributions carryover to 2025.** Subtract lines 7 and 8 from line 6a	1,397,961,638			
10 Analysis of line 9:				
a Excess from 2020 274,875,861				
b Excess from 2021 264,463,781				
c Excess from 2022. . . . 271,562,776				
d Excess from 2023 289,054,730				
e Excess from 2024 298,004,490				

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).)

MARILYN SIMONS

JAMES SIMONS

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-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	525990	131,124	14	5,968,532	
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property	531110	-5,109,817	16	-762,570	
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory	525990	2,613,325	18	52,829,907	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a SUBPART F INCOME INCLUSION			01	108,737,564	
b CREDIT CARD REBATE			01	245,303	
c OTHER MISCELLANEOUS INCOME			01	5,806	
d PORTFOLIO INCOME FROM LPS	525990	-1,877,125			
e					
12 Subtotal. Add columns (b), (d), and (e)		-4,242,493		167,024,542	0

13 Total. Add line 12, columns (b), (d), and (e) **13** 162,782,049

(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.)

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 2025-11-13 — ▶ 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
SCOTT THOMPSETT				P00741490
Firm's name ▶ GRANT THORNTON ADVISORS LLC				Firm's EIN ▶99-1856619
Firm's address ▶ 757 THIRD AVENUE 9TH FLOOR NEW YORK, NY 100172013				Phone no. (212) 599-0100

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
KPMG LLP	148,000	72,100	0	80,875
GRANT THORNTON ADVISORS LLC	116,830	64,698	0	107,422
ALTRUCORE CONSULTING	30,375	24,300	0	6,075
CITRIN COOPERMAN & COMPANY LLP	23,625	0	0	23,625

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Category	Amount
N/A	0

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Election: SEE STATEMENT 24

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

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2023-06-29	155,477	SIMONS-EMORY INTERNATIONAL CONSORTIUM ON MOTOR CONTROL	155,477	NO	3/1/2025	2025-03-28	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2023-11-30	48,165	MECHANISMS OF LEARNING IN CORTICAL NEURAL NETWORKS	48,165	NO	12/31/2024	2024-12-31	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2024-05-30	72,330	MECHANISMS OF LEARNING IN CORTICAL NEURAL NETWORKS	72,330	NO	3/1/2025	2025-03-28	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2024-11-30	48,165	MECHANISMS OF LEARNING IN CORTICAL NEURAL NETWORKS	34,764	NO	3/1/2025	2025-03-28	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2023-10-30	70,200	INTERNATIONAL BRAIN LABORATORY	70,200	NO	6/30/2024	2025-06-30	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2024-04-30	70,200	INTERNATIONAL BRAIN LABORATORY	70,200	NO	10/1/2024	2024-10-25	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2024-11-30	70,200	INTERNATIONAL BRAIN LABORATORY	28,750	NO	3/1/2025	2025-03-01	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2023-11-30	61,500	COMMUNICATION BETWEEN NEURAL POPULATIONS: CIRCUITS, CODING, AND BEHAVIOR	61,500	NO	12/31/2024	2024-12-31	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2024-06-30	58,500	COMMUNICATION BETWEEN NEURAL POPULATIONS: CIRCUITS, CODING, AND BEHAVIOR	58,500	NO	3/31/2025	2025-03-31	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2024-11-30	80,220	COMMUNICATION BETWEEN NEURAL POPULATIONS: CIRCUITS, CODING, AND BEHAVIOR	38,770	NO	3/31/2025	2025-03-31	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY. THE AMOUNT EXPENDED INCLUDES A UNSPENT BALANCE REFUND.
CHAMPALIMAUD FOUNDATION	AV DE BRASILIA LISBON 1400-038 PO	2024-03-28	119,040	RAPID SYNCHRONIZATION BETWEEN INTERNAL COGNITIVE REPRESENTATIONS AND THE STEPPING RHYTHM	119,040	NO	11/1/2024	2024-11-05	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CLINICAL RESEARCH ASSOCIATES	160 5TH AVENUE 7TH FLOOR NEW YORK, NY 10010	2023-11-01	1,010,000	ARABACLOFEN DRUG TRIAL	1,010,000	NO	12/31/2023, 3/31/2024	2023-12-31	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CLINICAL RESEARCH ASSOCIATES	160 5TH AVENUE 7TH FLOOR NEW YORK, NY 10010	2024-01-01	550,000	ARABACLOFEN DRUG TRIAL	550,000	NO	3/31/2024, 6/30/2024	2024-03-31	THE FOUNDATION HAS REVIEWED

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
									THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CLINICAL RESEARCH ASSOCIATES	160 5TH AVENUE 7TH FLOOR NEW YORK, NY 10010	2024-03-06	1,080,000	ARABACLOFEN DRUG TRIAL	1,080,000	NO	6/30/2024, 9/30/2024	2024-06-30	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CLINICAL RESEARCH ASSOCIATES	160 5TH AVENUE 7TH FLOOR NEW YORK, NY 10010	2024-06-30	1,297,515	ARABACLOFEN DRUG TRIAL	1,297,515	NO	9/30/2024, 12/31/2024	2024-09-30	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
CLINICAL RESEARCH ASSOCIATES	160 5TH AVENUE 7TH FLOOR NEW YORK, NY 10010	2024-09-12	1,300,000	ARABACLOFEN DRUG TRIAL	826,159	NO	12/31/2024,3/31/2025	2024-12-31	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
THE ESTHER A & JOSEPH KLINGENSTEIN FUND INC	80 8TH AVENUE SUITE 1400 NEW YORK, NY 10011	2022-10-28	1,300,000	THROUGH ITS COLLABORATION WITH THE SIMONS FOUNDATION, THE KLINGENSTEIN-SIMONS FELLOWSHIP AWARDS IN NEUROSCIENCE SUPPORTS EARLY CAREER INVESTIGATORS ENGAGED IN BASIC OR CLINICAL RESEARCH THAT MAY LEAD TO A BETTER UNDERSTANDING OF NEUROLOGICAL AND PSYCHIATRIC DISORDERS. THE FELLOWSHIP AWARDS PROMOTE HIGH-RISK, AND POTENTIALLY HIGH-REWARD, PROJECTS. AIMED AT ADVANCING CUTTING-EDGE INVESTIGATIONS, THE AWARDS ARE PRESENTED TO HIGHLY PROMISING, EARLY CAREER SCIENTISTS. AT THIS CRITICAL JUNCTURE IN THEIR CAREERS, FUNDING CAN BE A CHALLENGE.	1,300,000	NO	12/1/2023, 2/1/2024	2023-12-31	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
THE ESTHER A & JOSEPH KLINGENSTEIN FUND INC	80 8TH AVENUE SUITE 1400 NEW YORK, NY 10011	2023-10-30	1,300,000	THROUGH ITS COLLABORATION WITH THE SIMONS FOUNDATION, THE KLINGENSTEIN-SIMONS FELLOWSHIP AWARDS IN NEUROSCIENCE SUPPORTS EARLY CAREER INVESTIGATORS ENGAGED IN BASIC OR CLINICAL RESEARCH THAT MAY LEAD TO A BETTER UNDERSTANDING OF NEUROLOGICAL AND PSYCHIATRIC DISORDERS. THE FELLOWSHIP AWARDS PROMOTE HIGH-RISK, AND POTENTIALLY HIGH-REWARD, PROJECTS. AIMED AT ADVANCING CUTTING-EDGE INVESTIGATIONS, THE AWARDS ARE PRESENTED TO HIGHLY PROMISING, EARLY CAREER SCIENTISTS. AT THIS CRITICAL JUNCTURE IN THEIR CAREERS, FUNDING CAN BE A CHALLENGE.	403,904	NO	2/1/2024, 9/30/2025	2024-02-01	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
HIGHLAND CENTER FOR THE ARTS TRUST	2875 HARDWICK STREET GREENSBORO, VT 05841	2023-09-28	150,000	HIGHLAND CENTER FOR THE ARTS TOTAL ECLIPSE GIFT	150,000	NO	3/1/2024	2024-03-01	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
INTERNATIONAL MATHEMATICAL UNION	HAUSVOGTEIPLATZ 11A BERLIN 10117 GM	2023-02-02	45,000	IMU-SIMONS AFRICAN FELLOWSHIP PROGRAM	45,000	NO	12/31/2024	2025-01-14	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
J PAUL GETTY TRUST	1200 GETTY CENTER DRIVE LOS ANGELES, CA 90049	2023-09-28	500,000	PST ART: ART AND SCIENCE COLLIDE PROGRAMMING & OUTREACH	500,000	NO	9/1/2024	2024-09-01	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
MONTEREY BAY AQUARIUM RESEARCH INSTITUTE	7700 SANDHOLDT ROAD MOSS LANDING, CA 95039	2023-08-30	90,000	INVESTIGATING THE PRODUCTIVITY-DIVERSITY RELATIONSHIP ACROSS MARINE ECOSYSTEMS	90,000	NO	2/1/2024, 6/1/2024	2024-02-01	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
MONTEREY BAY AQUARIUM RESEARCH INSTITUTE	7700 SANDHOLDT ROAD MOSS LANDING, CA 95039	2024-06-30	90,000	INVESTIGATING THE PRODUCTIVITY-DIVERSITY RELATIONSHIP ACROSS MARINE ECOSYSTEMS	90,000	NO	2/1/2025, 6/1/2025	2025-02-24	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
POSTER HOUSE INC	119 W 23RD STREET FRONT 1 NEW YORK, NY 10011	2023-12-28	10,000	WE TRIED TO WARN YOU! ENVIRONMENTAL CRISIS POSTERS, 1970-2020	10,000	NO	3/1/2025	2025-03-01	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
TECHNION RESEARCH AND DEVELOPMENT FOUNDATION	SENATE BLDG ROOM 109 TECHNION CITY HAIFA 3200003 IS	2023-11-30	162,699	CYANOPHAGE AND CYANOBACTERIA: THE INTRACELLULAR STRUGGLE BETWEEN TWO ANTAGONISTS	162,699	NO	12/1/2024	2024-12-01	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.
TECHNION RESEARCH AND DEVELOPMENT FOUNDATION	SENATE BLDG ROOM 109 TECHNION CITY HAIFA 3200003 IS	2023-09-28	123,142	SCOPE-ALOHA AND GRADIENTS	123,142	NO	12/1/2024	2024-12-01	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
									THEIR ACCURACY OR RELIABILITY.
TECHNION RESEARCH AND DEVELOPMENT FOUNDATION	SENATE BLDG ROOM 109 TECHNION CITY HAIFA 3200003 IS	2023-12-28	123,142	SCOPE-ALOHA AND GRADIENTS	123,142	NO	12/1/2024	2024-12-01	THE FOUNDATION HAS REVIEWED THE GRANTEE'S REPORTS AND HAS FOUND NO REASON TO DOUBT THEIR ACCURACY OR RELIABILITY.

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Identifier	Return Reference	Explanation
	PART I, LINE 19 - DEPRECIATION EXPENSE	ACCUMULATED DEPRECIATION (12/31/23) - $156,737,921DEPRECIATION EXPENSE - $27,902,214AMORTIZATION EXPENSE - $5,592,770PART I LINE 19 - DEPRECIATION - $33,494,984RETIREMENTS - $(14,084,645)ACCUMULATED DEPRECIATION (12/31/24) - $176,148,260
	STATEMENT REGARDING ELECTION TO TREAT A 2024 DISTRIBUTION OUT OF CORPUS:	PURSUANT TO INTERNAL REVENUE CODE SECTION 4942(H)(2) AND TREASURY REGULATION SECTION 53.4942(A)-3(D)(2), THE SIMONS FOUNDATION, INC. HEREBY ELECTS TO TREAT CERTAIN QUALIFYING DISTRIBUTIONS MADE DURING THE 2024 TAX YEAR AS DISTRIBUTIONS MADE OUT OF CORPUS.ELECTION SUMMARY:DESCRIPTION:TOTAL QUALIFYING DISTRIBUTIONS FOR 2024 - $505,551,912CURRENT YEAR DISBURSEMENTS APPLIED AGAINST 2024 DISTRIBUTABLE AMOUNT - $(203,319,907)TREATED AS DISTRIBUTIONS OUT OF CORPUS (CONDUIT GRANTS) - $4,227,515TOTAL QUALIFYING DISTRIBUTIONS ATTRIBUTABLE TO THE SIMONS FOUNDATION, INC.'S GIVING TREATED AS MADE OUT OF CORPUS TO SATISFY REQUIREMENTS OF SECTIONS 170(B)(1)(F) AND 4942(G)(3) - $(4,227,515)EXCESS DISTRIBUTIONS CARRYOVER FROM 2024 - $298,004,490THE FOUNDATION MEETS THE REQUIREMENTS OF INTERNAL REVENUE CODE SECTIONS 170(B)(1)(A)(VII), 170(B)(1)(F)(II), AND 4942(H)(2). THE FOUNDATION NOTES THE FOLLOWING:- CLINICAL RESEARCH ASSOCIATES IS A CONTROLLED ENTITY OF THE SIMONS FOUNDATION, INC. THE ELECTION REPRESENTS CONDUIT GRANTS MADE BY THE SIMONS FOUNDATION, INC. TO CLINICAL RESEARCH ASSOCIATES, WHICH CLINICAL RESEARCH ASSOCIATES WILL RECOGNIZE AS QUALIFYING DISTRIBUTIONS ON ITS OWN RETURN.- THE SIMONS FOUNDATION HAS NO REMAINING UNDISTRIBUTED INCOME FOR THE 2023 AND 2024 TAX YEARS THAT WOULD PREVENT USE OF THIS ELECTION.- THE SIMONS FOUNDATION HAS MET ITS MINIMUM DISTRIBUTION REQUIREMENTS FOR 2024 WITHOUT TAKING INTO ACCOUNT ANY OF THE AMOUNTS INTENDED TO BE USED AS CONDUIT GRANTS.

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
HEDGE FUNDS	FMV	1,602,348,873	1,602,348,873
PRIVATE EQUITY FUNDS	FMV	672,974,379	672,974,379
INVESTMENT IN SUBSIDIARIES	FMV	1,577,656,847	1,577,656,847

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BUILDINGS	267,376,303	42,719,533	224,656,770	224,656,770
LEASED BUILDINGS	160,217,302	38,508,021	121,709,281	121,709,281
BUILDING IMPROVEMENTS	145,770,789	51,101,606	94,669,183	94,669,183
FURNITURE & FIXTURES	6,981,198	5,630,219	1,350,979	1,350,979
COMPUTER & IT EQUIPMENT	69,219,179	35,045,153	34,174,026	34,174,026
BUSINESS SOFTWARE	4,528,095	3,143,728	1,384,367	1,384,367
WORK IN PROGRESS	4,930,146	0	4,930,146	4,930,146

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ARNOLD & PORTER KAYE SCHOLER LLP	15,087	0	0	0
BRODY & BROWNE LLP	113,209	0	0	126,689
CLIFFORD CHANCE US LLP	28,752	0	0	0
COOLEY LLP	109,993	0	0	112,545
FRAGOMEN, DEL REY, BERNSEN, LOEWY LLP	21,801	0	0	21,451
HOFMANN-CREDNER RECHTSANWALTS GMBH	26,207	0	0	37,773
KLARIS LAW, PLLC	33,356	0	0	38,475
LITTLER MENDELSON, PC	18,664	0	0	18,664
LOEB BLOCK & PARTNERS LLP	172,353	11,493	0	107,474
MORGAN, LEWIS & BOCKIUS LLP	30,855	0	0	31,499
NORTON ROSE FULBRIGHT US LLP	11,904	0	0	13,671
PHILLIPS NIZER LLP	8,732	0	0	8,732
SCHANER & LUBITZ, PLLC	38,698	0	0	36,585
SLOSS ECKHOUSE DASTI HAYNES LAWCO LLP	108,076	0	0	102,932
TRUSTEES OF PRINCETON UNIVERSITY	7,253	0	0	7,253
WILSON ELSER MOSKOWITZ EDELMAN & DICKER LLP	41,850	0	0	41,850
OTHER MISC. LEGAL FEES	12,855	117	0	12,398

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Total Mortgage Amount: 188,643,031

Item No.	1
Lender's Name	MIDLAND LOAN SERVICES (FOUNDATION OFFICE)
Lender's Title	
Relationship to Insider	
Original Amount of Loan	110,000,000
Balance Due	110,000,000
Date of Note	
Maturity Date	
Repayment Terms	ON DEMAND
Interest Rate	
Security Provided by Borrower	NONE
Purpose of Loan	TO FUND OPERATIONS
Description of Lender Consideration	NONE
Consideration FMV	

Item No.	2
Lender's Name	BANK OF AMERICA (ALABAMA FLATS CO-OP SHARES & CONDO UNITS)
Lender's Title	
Relationship to Insider	
Original Amount of Loan	78,030,000
Balance Due	78,030,000
Date of Note	
Maturity Date	
Repayment Terms	ON DEMAND
Interest Rate	
Security Provided by Borrower	NONE
Purpose of Loan	TO PURCHASE COOP UNITS
Description of Lender Consideration	NONE
Consideration FMV	

Item No.	3
Lender's Name	PRO-RATA CO-OP ASSOCIATION MORTGAGE
Lender's Title	
Relationship to Insider	
Original Amount of Loan	607,496
Balance Due	613,031
Date of Note	
Maturity Date	
Repayment Terms	ON DEMAND
Interest Rate	
Security Provided by Borrower	NONE
Purpose of Loan	ALABAMA FLAT'S PRO-RATA SHARE OF OUTSTANDING MORTAGE HELD BY APARTMENT COOP
Description of Lender Consideration	
Consideration FMV	

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DUE FROM THIRD PARTIES	1,951,213	710,223	710,223
DUE FROM AFFILIATES	66,071	52,312	52,312
ESCROW RESERVES	408,415	626,968	626,968
MORTGAGE RECEIVABLE	5,880,000	5,880,000	5,880,000
INTEREST RATE SWAP ASSET	12,772,289	13,029,019	13,029,019

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Description	Amount
CHANGE IN POST EMPLOYMENT BENEFITS	552,418
LOSS ON DONATED FURNITURE	21,421

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DIRECT PROGRAM EXPENSE	16,860,914	0	0	16,193,946
GENOME SEQUENCING	5,409,642	0	0	3,823,057
FILM PRODUCTION	5,063,060	0	0	4,536,954
INFORMATION TECHNOLOGY	11,173,208	24,251	0	11,378,396
SCIENTIFIC DATA CENTERS	7,665,785	0	0	7,665,785
ADMINISTRATIVE EXPENSES	2,403,624	300	5,806	2,475,033
PUBLIC RELATIONS & COMMUNICATIONS	1,636,632	0	0	1,689,999
EMPLOYEE SUPPORTING COSTS	3,154,896	0	0	3,150,955
EMPLOYEE MATCHING GIFTS	862,266	0	0	789,109
INVESTMENT EXPENSES FROM LPS	0	3,161,701	0	0
FILM REVENUE WRITEOFF	108,098	0	0	108,098

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ADD BACK: UNRELATED BUSINESS INCOME TAXABLE LOSS FROM INVESTMENTS		2,014,545	
SUBPART F INCOME INCLUSION	108,737,564	108,737,564	0
CREDIT CARD REBATE	245,303	0	0
OTHER MISCELLANEOUS INCOME	5,806	0	5,806
PORTFOLIO INCOME FROM LPS	0	16,823,063	0

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Description	Amount
CHANGE IN NET UNREALIZED APPRECIATION OF INVESTMENTS	186,771,474
NET UNREALIZED GAIN ON INVESTMENT IN 100% OWNED SUBSIDIARIES	55,901,188
CHANGE IN FAIR VALUE OF INTEREST RATE SWAP	256,731

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Description	Beginning of Year - Book Value	End of Year - Book Value
LEASE LIABILITIES	168,228,586	168,194,187
OTHER POST-EMPLOYMENT BENEFITS LIABILITY	12,361,540	12,913,958
DEFERRED EXCISE TAX LIABILITY	12,344,287	15,713,161
EXCISE TAXES PAYABLE	0	654,108

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EMPLOYEE TRAINING/DEVELOPMENT	112,336	0	0	114,236
GRANTS MANAGEMENT SERVICES	130,600	0	0	130,600
HR CONSULTING & RECRUITING	1,661,553	0	0	1,653,291
INVESTMENT MANAGEMENT	886,496	886,496	0	0
IT CONSULTING	605,545	0	0	601,032
MISC. PROFESSIONAL SERVICES	181,457	26,875	0	138,270

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CURRENT & DEFERRED FEDERAL EXCISE TAX PROVISION	4,997,975	0	0	0
UNRELATED BUSINESS INCOME TAX	440,465	0	0	0
FOREIGN TAXES (K-1S)	0	281,275	0	0

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Name	US / Foreign Address	EIN	Description	Amount
ALABAMA FLATS LLC	160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	84-4179443	REPAYMENT OF INTERCOMPANY FUNDING	0
CLINICAL RESEARCH ASSOCIATES LLC	160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	46-3285474	FACILITIES & ADMINISTRATIVE SERVICE FEES	0
HELICOID INVESTMENT LIMITED	C/O HAMILTON TRUST MGMT CO LTD PALM GROVE HOUSE ROAD TOW VI	99-0688931	CAPITAL DISTRIBUTIONS	0
SANDBOX FILMS LLC	160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	83-2846472	FACILITIES & ADMINISTRATIVE SERVICE FEES	0
QUANTA PUBLISHING LLC	160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	93-2907176	FACILITIES & ADMINISTRATIVE SERVICE FEES	0
SF LEGACY LLC	160 FIFTH AVENUE 9TH FLOOR NEW YORK, NY 10010	85-4098013	CAPITAL DISTRIBUTIONS	0
SF LEGACY ECA LLC	160 FIFTH AVENUE 9TH FLOOR NEW YORK, NY 10010	87-4834139	THE FOUNDATION HAD NO TRANSFERS FROM SF LEGACY ECA LLC IN CALENDAR YEAR 2024.	0
NEWFOUNDLAND NFP LLC	160 FIFTH AVENUE 9TH FLOOR NEW YORK, NY 10010	37-1797362	CAPITAL DISTRIBUTIONS	0
MEDLEY 2F LP	ONE MARKET ST SPEAR TOWER SUITE 4100 SAN FRANCISCO, CA 94105	27-3944190	CAPITAL DISTRIBUTIONS	0
MEDLEY 3F LP	ONE MARKET ST SPEAR TOWER SUITE 4100 SAN FRANCISCO, CA 94105	47-2067327	CAPITAL DISTRIBUTIONS	0
MEDLEY 6FD LP	ONE MARKET ST SPEAR TOWER SUITE 4100 SAN FRANCISCO, CA 94105	92-0830455	CAPITAL DISTRIBUTIONS	0
Total				678,146,552

TY 2024 IRS 990 e-File Render

Name: THE SIMONS FOUNDATION INC

EIN: 13-3794889

Name	US / Foreign Address	EIN	Description	Amount
ALABAMA FLATS LLC	160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	84-4179443	RENT FOR SHORT TERM GUEST HOUSING	2,066,943
ALABAMA FLATS LLC	160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	84-4179443	INTERCOMPANY TRANSFER TO FUND OPERATIONS	250,000
CLINICAL RESEARCH ASSOCIATES LLC	160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	46-3285474	FUNDING TO SUPPORT CHARITABLE MISSION	4,227,515
HELICOID INVESTMENT LIMITED	C/O HAMILTON TRUST MGMT CO LTD PALM GROVE HOUSE ROAD TOW VI	99-0688931	THE FOUNDATION MADE NO TRANSFERS TO HELICOID INVESTMENT LIMITED IN CALENDAR YEAR 2024	0
SANDBOX FILMS LLC	160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	83-2846472	FUNDING TO SUPPORT CHARITABLE MISSION	5,525,590
SF LEGACY LLC	160 FIFTH AVENUE 9TH FLOOR NEW YORK, NY 10010	85-4098013	THE FOUNDATION MADE NO TRANSFERS TO SF LEGACY LLC IN CALENDAR YEAR 2024	0
SF LEGACY ECA LLC	160 FIFTH AVENUE 9TH FLOOR NEW YORK, NY 10010	87-4834139	CAPITAL CONTRIBUTION	10,600
NEWFOUNDLAND NFP LLC	160 FIFTH AVENUE 9TH FLOOR NEW YORK, NY 10010	37-1797362	THE FOUNDATION MADE NO TRANSFERS TO SF NEWFOUNDLAND NFP LLC IN CALENDAR YEAR 2024	0
MEDLEY 2F LP	ONE MARKET ST SPEAR TOWER SUITE 4100 SAN FRANCISCO, CA 94105	27-3944190	CAPITAL CONTRIBUTION	1,134,440
MEDLEY 3F LP	ONE MARKET ST SPEAR TOWER SUITE 4100 SAN FRANCISCO, CA 94105	47-2067327	CAPITAL CONTRIBUTION	2,151,076
MEDLEY 6FD LP	ONE MARKET ST SPEAR TOWER SUITE 4100 SAN FRANCISCO, CA 94105	92-0830455	CAPITAL CONTRIBUTION	5,646,491
QUANTA PUBLISHING LLC	160 FIFTH AVENUE 7TH FLOOR NEW YORK, NY 10010	93-2907176	FUNDING TO SUPPORT CHARITABLE MISSION	1,032,792
Total				22,045,447