

990-PF

Form
Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ Do not enter social security numbers on this form as it may be made public.

▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

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

Name of foundation GLOBAL VILLAGE CHARITABLE TRUST		A Employer identification number 34-1757652	
Number and street (or P.O. box number if mail is not delivered to street address) 4000 PONCE DE LEON BLVD 510		Room/suite	B Telephone number (see instructions) (305) 448-2469
City or town, state or province, country, and ZIP or foreign postal code CORAL GABLES, FL 33146		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) ▶\$ 2,255,330		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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)	11,231,239			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	70,832	70,832		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	5,694,919			
	b Gross sales price for all assets on line 6a 5,694,919				
	7 Capital gain net income (from Part IV, line 2)		5,694,919		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	16,996,990	5,765,751		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	6,324	3,162		3,162
	c Other professional fees (attach schedule)	8,075	8,075		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	275	75		200
	24 Total operating and administrative expenses. Add lines 13 through 23	14,674	11,312		3,362
	25 Contributions, gifts, grants paid	10,797,398			10,797,398
	26 Total expenses and disbursements. Add lines 24 and 25	10,812,072	11,312		10,800,760
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	6,184,918			
	b Net investment income (if negative, enter -0-)		5,754,439		
	c Adjusted net income (if negative, enter -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		30,200	30,000	30,000
	2	Savings and temporary cash investments		604,347	720,293	720,293
	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)		917,827	1,505,037	1,505,037
	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)				
	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)		1,552,374	2,255,330	2,255,330	
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		1,552,374	2,255,330	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund		0	0	
	28	Retained earnings, accumulated income, endowment, or other funds		0	0	
	29	Total net assets or fund balances (see instructions)		1,552,374	2,255,330	
30	Total liabilities and net assets/fund balances (see instructions) .		1,552,374	2,255,330		

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	1,552,374
2	Enter amount from Part I, line 27a	2	6,184,918
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	7,737,292
5	Decreases not included in line 2 (itemize) ▶ _____	5	5,481,962
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	2,255,330

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 NORTHERN TRUST #81580	D	2012-12-14	2023-12-31
b PNC #59011	D	2021-01-01	2023-12-31
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 170,632			170,632
b 5,524,287			5,524,287
c			
d			
e			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a			170,632
b			5,524,287
c			
d			
e			

2 Capital gain net income or (net capital loss)

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

If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7

2

3

5,694,919

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)		
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)	1	79,987
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	79,987
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	79,987
6	Credits/Payments:		
a	2023 estimated tax payments and 2022 overpayment credited to 2023	6a	26,683
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	100,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	126,683
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached.	8	2,658
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	44,038
11	Enter the amount of line 10 to be: Credited to 2024 estimated tax Refunded	11	0

Part VI-A

Statements Regarding Activities

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?		Yes	No
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.			No
	<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>			
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. ▶ \$ <u>0</u> (2) On foundation managers. ▶ \$ <u>0</u>			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ <u>0</u>			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T.</i>	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? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ OH _____			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	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)? <i>If "Yes," attach schedule. See instructions.</i>	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i>	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>DANIEL R LEWIS</u> Telephone no. ▶ <u>(305) 461-3632</u> Located at ▶ <u>4000 PONCE DE LEON BLVD CORAL GABLES FL 33146</u> ZIP+4 ▶ _____			
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 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. <i>If "Yes", enter the name of the foreign country</i> ▶ _____	16	Yes	No
				No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)	No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)	No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)	No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)	No
b	If any answer is "Yes" to 1a(1)–(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	
c	Organizations relying on a current notice regarding disaster assistance check here. 		
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2023?	1d	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023? If "Yes," list the years  20____, 20____, 20____, 20____	2a	No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	No
b	If "Yes," did it have excess business holdings in 2023 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2023.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2023?	4b	No

Part VI-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

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))?

(2)

Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

(4)

Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

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

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).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
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?

b

If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?

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?

Yes

No

5a(1)

No

5a(2)

No

5a(3)

No

5a(4)

No

5a(5)

No

5b

No

5d

6a

No

6b

No

7a

No

7b

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

DANIEL R LEWIS
4000 PONCE DE LEON BLVD
CORAL GABLES, FL 33146

TRUSTEE
1.00

0

0

0

MARLEY BLUE LEWIS
25 TOMPKINS PLACE
BROOKLYN, NY 11231

FOUNDATION MANAGER
1.00

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	

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	1,531,583
b	Average of monthly cash balances.	1b	698,654
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,230,237
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	2,230,237
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	33,454
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	2,196,783
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	109,839

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	109,839
2a	Tax on investment income for 2022 from Part V, line 5.	2a	79,987
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	79,987
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	29,852
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	29,852
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	29,852

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	10,800,760
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	10,800,760

Part XII

Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7					29,852
2 Undistributed income, if any, as of the end of 2022:					
a Enter amount for 2022 only.				0	
b Total for prior years: 20 __, 20 __, 20 __			0		
3 Excess distributions carryover, if any, to 2022:					
a From 2018.		3,753,469			
b From 2019.		2,613,083			
c From 2020.		4,510,149			
d From 2021.		9,554,084			
e From 2022.		3,003,610			
f Total of lines 3a through e.		23,434,395			
4 Qualifying distributions for 2023 from Part XI, line 4: ► \$ 10,800,760					
a Applied to 2022, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see instructions).			0		
c Treated as distributions out of corpus (Election required—see instructions).		0			
d Applied to 2023 distributable amount					29,852
e Remaining amount distributed out of corpus		10,770,908			
5 Excess distributions carryover applied to 2023. (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		34,205,303			
b Prior years' undistributed income. Subtract line 4b from line 2b.			0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed			0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.			0		
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.				0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).		0			
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)		3,753,469			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a		30,451,834			
10 Analysis of line 9:					
a Excess from 2019		2,613,083			
b Excess from 2020		4,510,149			
c Excess from 2021.		9,554,084			
d Excess from 2022		3,003,610			
e Excess from 2023		10,770,908			

Part XIII

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2023, enter the date of the ruling						
b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)						
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2023	(b) 2022	(c) 2021	(d) 2020	
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

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).)

MARLEY BLUE LEWIS

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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE LEWIS PRIZE CO ANCHIN 3 TIMES SQUARE NEW YORK,NY 10036	NONE	P C	GENERAL OPERATION	2,165,664
THE MIAMI FOUNDATION 40 NW 3RD STREET 305 MIAMI,FL 33128	NONE	P C	GENERAL OPERATION	5,996,402
GREATER MIAMI JEWISH FEDERATION 4200 BISCAYNE BLVD MIAMI,FL 33137	NONE	P C	GENERAL OPERATION	600,000
THE MANAGEMENT CENTER 1710 RHODE ISLAND AVE NW 1100 WASHINGTON,DC 20036	NONE	P C	GENERAL OPERATION	425,000
CLEVELAND CLINIC FOUNDATION 6801 BRECKSVILLE ROAD RK 1-85 INDEPENDENCE,OH 441315032	NONE	P C	GENERAL OPERATION	250,000
THIRD WAY INSTITUTE 1025 CONNECTICUT AVE NW SUITE 400 WASHINGTON,DC 20036	NONE	P C	GENERAL OPERATION	250,000
BROOKLYN MUSEUM 200 EASTERN PARKWAY BROOKLYN,NY 11238	NONE	P C	GENERAL OPERATION	226,800
INTERLOCHEN CENTER FOR THE ARTS PO BOX 199 INTERLOCHEN,MI 48201	NONE	P C	GENERAL OPERATION	200,000
ACLU FOUNDATION 125 BROAD STREET 18TH FLR NEW YORK,NY 10004	NONE	P C	GENERAL OPERATION	180,000
LIGHT PREPARATORY ACADEMY 17051 NW 11TH STREET PEMBROKE PINES,FL 33028	NONE	P C	GENERAL OPERATION	50,000
CHAPMAN PARTNERSHIP 1550 NORTH MIAMI AVENUE MIAMI,FL 33136	NONE	P C	GENERAL OPERATION	50,000
GLENS FALLS YOUTH CENTER 60 MONTCALM STREET GLENS FALLS,NY 12801	NONE	P C	GENERAL OPERATION	42,000
SAVE THE MUSIC PO BOX 6268 HOBOKEN,NJ 07030	NONE	P C	GENERAL OPERATION	25,000
BANG ON A CAN 80 HANSON PLACE SUITE 301 BROOKLYN,NY 11217	NONE	P C	GENERAL OPERATION	25,000
BARNARD COLLEGE 3009 BROADWAY NEW YORK,NY 10027	NONE	P C	GENERAL OPERATION	24,332
	NONE	P C	GENERAL OPERATION	18,000

CLEVELAND ORCHESTRA 11001 EUCLID AVENUE CLEVELAND,OH 441064310				
DOUBLE H RANCH PO BOX 1378 WILLISTON,VT 05485	NONE	P C	GENERAL OPERATION	18,000
GODS LOVE WE DELIVER 166 AVENUE OF THE AMERICAS NEW YORK,NY 10013	NONE	P C	GENERAL OPERATION	18,000
LAKE GEORGE ASSOCIATION P O BOX 408 LAKE GEORGE,NY 128450408	NONE	P C	GENERAL OPERATION	18,000
PROPUBLICA 155 AVENUE OF THE AMERICAS 13TH FLOOR NEW YORK,NY 10013	NONE	P C	GENERAL OPERATION	18,000
UNITING VOICES CHICAGO 78 EAST WASHINGTON ST CHICAGO,IL 60602	NONE	P C	GENERAL OPERATION	18,000
YOUNG ARTS FOUNDATION 35-21 215TH STREET 2F BAYSIDE,NY 11361	NONE	P C	GENERAL OPERATION	18,000
CASE WESTERN RESERVE UNIVERSITY 9601 CHESTER AVE CLEVELAND,OH 44106	NONE	P C	GENERAL OPERATION	18,000
BRANCHES ORGANIZATION PO BOX 1124 INDIANOLA,MS 387511124	NONE	P C	GENERAL OPERATION	18,000
ST ANNE'S SCHOOL PO BOX 1052 PORTERVILLE,CA 93258	NONE	P C	GENERAL OPERATION	18,000
MIAMI CHILDREN'S CHORUS 7604 SW 188TH TERRACE CUTLER BAY,FL 33157	NONE	P C	GENERAL OPERATION	18,000
LAKE GEORGE LAND CONSERVACY PO BOX 1250 BOLTON LANDING,NY 12814	NONE	P C	GENERAL OPERATION	18,000
CALDER GARDENS 207 W 25TH ST 12 NEW YORK,NY 10001	NONE	P C	GENERAL OPERATION	18,000
SARATOGA PERFORMING ARTS CENTER 108 AVENUE OF THE PINES SARATOGA SPRINGS,NY 128666296	NONE	P C	GENERAL OPERATION	10,000
IMPACT ISRAEL INC 200 HIGHLAND AVENUE SUITE 301 NEEDHAM,MA 02494	NONE	P C	GENERAL OPERATION	5,400
EL SISTEMA USA P O BOX 200 DURNHAM,NC 27702	NONE	P C	GENERAL OPERATION	3,600
ROCK AND ROLL HALL OF FAME AND MUSEUM INC 1100 ROCK AND ROLL BLVD CLEVELAND,OH 44114	NONE	P C	GENERAL OPERATION	1,800

TEMPLE BETH AM JOHN WENZEL 5950 NORTH KENDALL DRIVE PINECREST,FL 33156	NONE	P C	GENERAL OPERATION	1,800
OVERTOWN YOUTH CENTER 450 NW 14TH STREET MIAMI,FL 33136	NONE	P C	GENERAL OPERATION	1,800
NSU ART MUSEUM FORT LAUDERDALE 1 E LAS OLAS BLVD FORT LAUDERDALE,FL 33301	NONE	P C	GENERAL OPERATION	1,800
NEW YORK PHILHARMONIC 10 LINCOLN CENTER PLAZA NEW YORK,NY 10023	NONE	P C	GENERAL OPERATION	1,800
MARLBORO MUSIC SCHOOL & FESTIVAL BOX K MARLBORO,VT 05344	NONE	P C	GENERAL OPERATION	1,800
DETROIT SYMPHONY ORCHESTRA 3711 WOODWARD AVENUE DETROIT,MI 48226	NONE	P C	GENERAL OPERATION	1,800
HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON,DC 20024	NONE	P C	GENERAL OPERATION	1,800
SUE & LEONARD MILLER CENTER FOR CONTEMPORARY JUDAIC STUDIES 5202 UNIVERSITY DRIVE CORAL GABLES,FL 33124	NONE	P C	GENERAL OPERATION	1,800
UNITED WAY OF MIAMI DADE 3250 SW THIRD AVENUE MIAMI,FL 33129	NONE	P C	GENERAL OPERATION	1,800
GLENS FALLS HOSPITAL FOUNDATION 126 SOUTH STREET GLENS FALLS,NY 12801	NONE	P C	GENERAL OPERATION	1,800
INSTITUTE OF CONTEMPORARY ART 25 HARBOR SHORE DRIVE BOSTON,MA 02210	NONE	P C	GENERAL OPERATION	1,800
TEMPLE BETH EL 3 MARION AVENUE GLENS FALLS,NY 12801	NONE	P C	GENERAL OPERATION	1,800
AMERICAN COMPOSERS FORUM 75 WEST 5TH STREET SUITE 416 SAINT PAUL,MN 551021439	NONE	P C	GENERAL OPERATION	1,800
MIAMI SYMPHONY ORCHESTRA 3900 NORTH MIAMI AVE MIAMI,FL 33127	NONE	P C	GENERAL OPERATION	1,800
PLAY ON PHILLY PO BOX 8662 PHILADELPHIA,PA 19101	NONE	P C	GENERAL OPERATION	1,800
BOLTON VOLUNTEER FIRE DEPARTMENT PO BOX 1365 BOLTON LANDING,NY 12814	NONE	P C	GENERAL OPERATION	1,800
UP YONDA FARM	NONE	P C	GENERAL OPERATION	1,800

PO BOX 1453 BOLTON LANDING, NY 12814				
EIGHTH BLACKBIRD 4045 N ROCKWELL STREET CHICAGO, IL 60618	NONE	PC	GENERAL OPERATION	1,800
Total ▶ 3a				10,797,398
b Approved for future payment				
Total ▶ 3b				0

Enter gross amounts unless otherwise indicated.

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						
4 Dividends and interest from securities				14	70,832	
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						
8 Gain or (loss) from sales of assets other than inventory				18	5,694,919	
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		5,765,751	0
13 Total. Add line 12, columns (b), (d), and (e).				13		5,765,751

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

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.)

[illegible]

Part XVI

Yes

[illegible]☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

Title

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

NEW YORK, NY 10036

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B (Form 990) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.	OMB No. 1545-0047
		2023
Name of the organization GLOBAL VILLAGE CHARITABLE TRUST		Employer identification number 34-1757652

Organization type (check one):

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

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

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

Name of organization GLOBAL VILLAGE CHARITABLE TRUST	Employer identification number 34-1757652
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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	DANIEL LEWIS 4000 PONCE DE LEON BLVD CORAL GABLES, FL 33146	\$ 230,413	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
2	DANIEL LEWIS 4000 PONCE DE LEON BLVD CORAL GABLES, FL 33146	\$ 2,155,754	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
3	DANIEL LEWIS 4000 PONCE DE LEON BLVD CORAL GABLES, FL 33146	\$ 3,402,750	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
4	DANIEL LEWIS 4000 PONCE DE LEON BLVD CORAL GABLES, FL 33146	\$ 5,442,322	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
.		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
.		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization GLOBAL VILLAGE CHARITABLE TRUST	Employer identification number 34-1757652
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Part II

Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	1,620 SHS PROGRESSIVE CORP	\$ 230,413	2023-03-01
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
2	14,806 SHS PROGRESSIVE CORP	\$ 2,155,754	2023-03-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
3	25,000 SHS PROGRESSIVE CORP	\$ 3,402,750	2023-05-18
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
4	42,356 SHS PROGRESSIVE CORP	\$ 5,442,322	2023-05-26
(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 GLOBAL VILLAGE CHARITABLE TRUST	Employer identification number 34-1757652
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	

Additional Data

[Return to Form](#)

Software ID:

Software Version:

TY 2023 IRS 990 e-File Render

Name: GLOBAL VILLAGE CHARITABLE TRUST
EIN: 34-1757652

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	6,324	3,162		3,162

TY 2023 IRS 990 e-File Render

Name: GLOBAL VILLAGE CHARITABLE TRUST

EIN: 34-1757652

Name of Stock	End of Year Book Value	End of Year Fair Market Value
4714 SHS PROGRESSIVE CORP	750,846	750,846
4735 SHS PROGRESSIVE CORP	754,191	754,191

TY 2023 IRS 990 e-File Render

Name: GLOBAL VILLAGE CHARITABLE TRUST

EIN: 34-1757652

Description	Amount
UNREALIZED GAIN ON INVESTMENT	5,481,962

TY 2023 IRS 990 e-File Render

Name: GLOBAL VILLAGE CHARITABLE TRUST
EIN: 34-1757652

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	200	0		200
BANK CHARGE	75	75		0

TY 2023 IRS 990 e-File Render

Name: GLOBAL VILLAGE CHARITABLE TRUST
EIN: 34-1757652

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	8,075	8,075		0