

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

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

Name of foundation: TARA HEALTH FOUNDATION. A Employer identification number: 46-5645300. B Telephone number: (415) 547-9025. C If exemption application is pending, check here. D 1. Foreign organizations, check here. D 2. Foreign organizations meeting the 85% test, check here and attach computation. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. G Check all that apply: Initial return, Initial return of a former public charity, Final return, Amended return, Address change, Name change. H Check type of organization: Section 501(c)(3) exempt private foundation, Section 4947(a)(1) nonexempt charitable trust, Other taxable private foundation. I Fair market value of all assets at end of year: \$34,456,589. J Accounting method: Cash, Accrual, Other (specify).

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).)

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), followed by summary rows 27-29.

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	4,459,753	1,862,601	1,862,601
	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) ▶ _____ <u>3,025,174</u> Less: allowance for doubtful accounts ▶ _____ <u>0</u>	4,324,002	3,025,174	3,025,174
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	7,314	6,947	6,947
	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)	42,772,659	28,000,422	28,000,422
	14 Land, buildings, and equipment: basis ▶ _____ <u>17,324</u> Less: accumulated depreciation (attach schedule) ▶ _____	15,642	17,324	17,324
15 Other assets (describe ▶ _____)	43,502	1,544,121	1,544,121	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	51,622,872	34,456,589	34,456,589	
Liabilities	17 Accounts payable and accrued expenses	478,271	17,220	
	18 Grants payable	14,616,392	9,017,800	
	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 ▶ _____)	7,466,863	75,338	
	23 Total liabilities (add lines 17 through 22)	22,561,526	9,110,358	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	0	0	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	29,061,346	25,346,231	
29 Total net assets or fund balances (see instructions)	29,061,346	25,346,231		
30 Total liabilities and net assets/fund balances (see instructions)	51,622,872	34,456,589		

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	29,061,346
2 Enter amount from Part I, line 27a	2	1,462,165
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	30,523,511
5 Decreases not included in line 2 (itemize) ▶ _____	5	5,177,280
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	25,346,231

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows include publicly traded securities and other investment loss.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Rows show sales prices and corresponding gains/losses.

Table with 4 columns: (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), (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)).

Summary rows for capital gain net income (line 2) and net short-term capital gain or loss (line 3).

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

Table for excise tax calculation with 11 rows. Includes exemptions, tax under section 511, tax based on investment income, and credits/payments.

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?

Table with columns Yes, No and row 1a

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.

Table with columns Yes, No and row 1b

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?

Table with columns Yes, No and row 1c

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?

Table with columns Yes, No and row 2

If "Yes," attach a detailed description of the activities.

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

Table with columns Yes, No and row 3

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

Table with columns Yes, No and row 4a

b If "Yes," has it filed a tax return on Form 990-T for this year?

Table with columns Yes, No and row 4b

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

Table with columns Yes, No and row 5

If "Yes," attach the statement required by General Instruction T.

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?

Table with columns Yes, No and row 6

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.

Table with columns Yes, No and row 7

8a Enter the states to which the foundation reports or with which it is registered (see instructions)

CA, DE

Table with columns Yes, No and row 8a

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.

Table with columns Yes, No and row 8b

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

Table with columns Yes, No and row 9

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

Table with columns Yes, No and row 10

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.

Table with columns Yes, No and row 11

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

Table with columns Yes, No and row 12

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?

Table with columns Yes, No and row 13

Website address HTTP://WWW.TARAHEALTHFOUNDATION.ORG/

14 The books are in care of FAMILY PHILANTHROPY ADVISORS Telephone no. (612) 377-

Located at 1818 OLIVER AVENUE SOUTH MINNEAPOLIS MN ZIP+4 8400

55405

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here

and enter the amount of tax-exempt interest received or accrued during the year 15

16 At any time during calendar year 2024, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?

Table with columns Yes, No and row 16

See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country

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

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

- 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?
 - (2)** Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
 - (3)** Furnish goods, services, or facilities to (or accept them from) a disqualified person?
 - (4)** Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
 - (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)?
 - (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.)
- 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
- 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?
- 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?
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.)
 - 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?
- 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.)
- 4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
- 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?

	Yes	No
1a(1)		No
1a(2)		No
1a(3)		No
1a(4)	Yes	
1a(5)		No
1a(6)		No
1b		No
1d		No
2a		No
2b		
3a		No
3b		
4a		No
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:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)		No
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		No
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		No
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	5a(4)		No
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)		No
b	If any answer is "Yes" to 5a(1)–(5); did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		
c	Organizations relying on a current notice regarding disaster assistance check <input type="checkbox"/>			
d	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d).	5d		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a		No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	8		No

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RUTH SHABER C/O 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	BOARD CHAIR 5.00	19,496	0	0
KIMBERLY SEALS ALLERS C/O 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	SECRETARY 5.00	50,000	0	0
ELLEN FRIEDMAN C/O 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	TREASURER 5.00	50,000	0	0
RACHEL ROBACCIOTTI C/O 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	BOARD MEMBER 5.00	50,000	0	0
MICHAEL PENN C/O 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	BOARD MEMBER 7.00	50,000	0	0


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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ELISE BELUSA 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	STRATEGY OFFICER 40.00	284,477	0	0
ELIZABETH KIRKLAND 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	EMPLOYEE 40.00	227,000	0	0
ROBYN RUSSELL 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	EMPLOYEE 40.00	176,068	0	0
ADEWALE ODUYE 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	EMPLOYEE 40.00	94,453	0	0
MIA REILLY 47 KEARNY STREET 600 SAN FRANCISCO, CA 94108	EMPLOYEE 40.00	93,500	0	0
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
KEECHA HARRIS AND ASSOCIATES 1061 LAKEVEIW CRES BIRMINGHAM, AL 35205	STRATEGIC STRATEGY CONSULTING	1,419,720
FAMILY PHILANTHROPY ADVISORS INC 1818 OLIVER AVENUE SOUTH MINNEAPOLIS, MN 55405	OPERATIONS, ADMINISTRATION AND COMPLIANCE CONSULTING	379,992
SOCIOVESTIX LABS LTD 9-10 ST ANDREW SQUARE EDUBBURGH SCOTLAND EH2 2AF UK	DATA ANALYSIS	153,982
RALLY POINT PUBLIC RELATIONS 276 5TH AVENUE SUITE 704-322 NEW YORK, NY 10001	PUBLIC RELATIONS CONSULTING	124,550
MIA REILLY 719 UNION STREET APT 4L BROOKLYN, NY 11215	COMMUNICATIONS CONSULTING	100,800

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

0

Part VIII- Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3 ▶ 0

Part IX Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	38,646,312
b	Average of monthly cash balances.	1b	919,749
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	39,566,061
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	39,566,061
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	593,491
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	38,972,570
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	1,948,629

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	1,948,629
2a	Tax on investment income for 2024 from Part V, line 5.	2a	125,000
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	125,000
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,823,629
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,823,629
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	1,823,629

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	12,078,466
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	12,078,466

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				1,823,629
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.	5,281,851			
b From 2020.	6,160,256			
c From 2021.	6,176,164			
d From 2022.	10,433,196			
e From 2023.	10,714,616			
f Total of lines 3a through e.	38,766,083			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ <u>12,078,466</u>				
a Applied to 2023, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2024 distributable amount				1,823,629
e Remaining amount distributed out of corpus	10,254,837			
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	49,020,920			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions)	5,281,851			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	43,739,069			
10 Analysis of line 9:				
a Excess from 2020	6,160,256			
b Excess from 2021	6,176,164			
c Excess from 2022.	10,433,196			
d Excess from 2023	10,714,616			
e Excess from 2024	10,254,837			

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 <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 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
b	85% (0.85) of line 2a	(a) 2024	(b) 2023	(c) 2022	(d) 2021	
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).)
RUTH SHABER

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> ACCELERATE CHANGE 294 WASHINGTON ST SUITE 500 BOSTON, MA 02108	NONE	501(C)(3)	BOARD DISCRETIONARY - ACTS OF REPARATIONS FILM PROJECT	5,000
AMALGAMATED FOUNDATION 1825 K STREET NW WASHINGTON, DC 20006	NONE	501(C)(3)	ABORTION MOVEMENT FUND	46,500
AMALGAMATED FOUNDATION 1825 K STREET NW WASHINGTON, DC 20006	NONE	501(C)(3)	BOARD DISCRETIONARY - ADASINA PROJECT	30,000
AMERICAN CIVIL LIBERTIES UNION 125 BROAD STREET NEW YORK, NY 10004	NONE	501(C)(3)	4-YEAR PILOT FOR DEVELOPING STATE LEVEL CORPORATE ENGAGEMENT STRATEGIES FOCUSED ON REPRODUCTIVE FREEDOM, GENDER JUSTICE, VOTING RIGHTS, RACIAL JUSTICE AND OTHER INTERSECTIONAL ISSUES	200,000
AS YOU SOW C/O MAIN POST OFFICE PO BOX 751 BERKELEY, CA 94701	NONE	501(C)(3)	BOARD DISCRETIONARY - GENERAL OPERATING SUPPORT/UNRESTRICTED	25,000
BEND THE ARC 330 SEVENTH AVENUE 19TH FLOOR NEW YORK, NY 10001	NONE	501(C)(3)	BOARD DISCRETIONARY - GENERAL OPERATING SUPPORT/UNRESTRICTED	5,000
BLACK WOMEN IN BLOCKCHAIN INC 11512 KIMBARK CT GAITHERSBURG, MD 20878	NONE	501(C)(3)	BOARD DISCRETIONARY - INCUBATOR PROGRAM	10,000
BUSINESS SOCIAL RESPONSIBILITY 220 MONTGOMERY ST STE 1700 SAN FRANCISCO, CA 94104	NONE	501(C)(3)	CORPORATE ENGAGEMENT ANCHOR ORGANIZATION	1,480,000
CARY CHRISTIAN CENTER PO BOX 57 CARY, MS 39054	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	75,000
CHICAGO ABORTION FUND 333 W NORTH AVENUE STE 267 CHICAGO, IL 60610	NONE	501(C)(3)	AMBASSADOR DISCRETIONARY - GENERAL OPERATING SUPPORT/UNRESTRICTED	5,000
COMMUNITY CATALYST ONE FEDERAL STREET 5TH FLOOR BOSTON, MA 02110	NONE	501(C)(3)	CONFRONTING RELIGIOUS HEALTH RESTRICTIONS: CREATING A LONG-TERM CHANGE AGENDA.	150,000
CRITERION INSTITUTE 81 CHURCH HILL RD HADDAM, CT 06438	NONE	501(C)(3)	BOARD DISCRETIONARY - GENERAL OPERATING SUPPORT/UNRESTRICTED	5,000
DC ABORTION FUND PO BOX 65061 WASHINGTON, DC 20035	NONE	501(C)(3)	STAFF DISCRETIONARY - GENERAL OPERATING SUPPORT/UNRESTRICTED	2,000
HIGHLANDER RESEARCH AND EDUCATION CENTER PO BOX 16109 JACKSON, MS 39236	NONE	501(C)(3)	PEOPLE'S ADVOCACY INSTITUTE	25,000
HOMEBOY INDUSTRIES 130 W BRUNO STREET	NONE	501(C)(3)	STAFF DISCRETIONARY - GENERAL OPERATING SUPPORT/UNRESTRICTED	5,000

LOS ANGELES, CA 90012	NONE	501(C)(3)	OASIS INSTITUTE	2,050,000
HOPEWELL FUND 1201 CONNECTICUT AVE NW SUITE 300 WASHINGTON, DC 20036	NONE	501(C)(3)	FUND LATER CARE PROGRAM	100,000
MIDWEST ACCESS COALITION PO BOX 408363 CHICAGO, IL 60640	NONE	501(C)(3)	ORCHID CAPITAL	2,050,000
MOVEMENT STRATEGY CENTER 436 14TH STREET SUITE 425 OAKLAND, CA 94612	NONE	501(C)(3)	ACCESS REPRODUCTIVE CARE - SOUTHEAST	7,500
NATIONAL NETWORK OF ABORTION FUNDS 9450 SW GEMINI DRIVE BEAVERTON, OR 97008	NONE	501(C)(3)	PATIENT FORWARD INITIATIVE	100,000
NEO PHILANTHROPY 45 W 36TH STREET 6TH FLOOR NEW YORK, NY 10018	NONE	501(C)(3)	STAFF DISCRETIONARY - NETWORK FOR GOOD	3,000
NEO PHILANTHROPY 45 W 36TH STREET 6TH FLOOR NEW YORK, NY 10018	NONE	501(C)(3)	BOARD DISCRETIONARY - GENERAL OPERATING SUPPORT/UNRESTRICTED	7,500
PLANNED PARENTHOOD SOUTH ATLANTIC STATES 100 SOUTH BOYLAN AVE RALEIGH, NC 27603	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	250,000
RHIA VENTURES 47 KEARNY ST STE 600 SAN FRANCISCO, CA 94108	NONE	501(C)(3)	AMBASSADOR DISCRETIONARY - TRAINING IN EARLY ABORTION FOR COMPREHENSIVE HEALTHCARE	10,000
SOCIAL AND ENVIRONMENTAL ENTREPRENEURS 23564 CALABASAS ROAD SUITE 201 CALABASAS, CA 91302	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	100,000
SPRINGBOARD TO OPPORTUNITIES 854 N JEFFERSON ST JACKSON, MS 39202	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	50,000
TEEN HEALTH MISSISSIPPI 125 S CONGRESS ST STE 1330 JACKSON, MS 39201	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	100,000
THE KNIGHTS & ORCHIDS SOCIETY 17 BROAD ST SELMA, AL 36701	NONE	501(C)(3)	BOARD DISCRETIONARY - PERINATAL WORKFORCE SUSTAINABILITY	10,000
THE LOVE PACKAGE PROJECT 9124 SOUTH MARSHFIELD AVENUE CHICAGO, IL 60620	NONE	501(C)(3)	BOARD DISCRETIONARY - THE PHILANTHROPY WORKSHOP RENEWAL	12,000
THE PHILANTHROPY WORKSHOP 100 BROADWAY 17TH FLOOR NEW YORK, NY 10005	NONE	501(C)(3)	BOARD DISCRETIONARY - THE LANCET COMMISSION ON ANTIRACISM IN SOLIDARITY - MATERNAL HEALTH WORKING GROUP	30,000
THE URBAN INSTITUTE 500 LENFANT PLAZA SW WASHINGTON, DC 20024	NONE	501(C)(3)	BOARD DISCRETIONARY - GENERAL OPERATING SUPPORT/UNRESTRICTED	5,000
THE VOTER PARTICIPATION PROJECT 1707 L STREET NW STE 700 WASHINGTON, DC 20036	NONE	501(C)(3)	BOARD DISCRETIONARY - VOTER MOVEMENT FUND	5,000
TIDES FOUNDATION	NONE	501(C)(3)		

1012 TORNEY AVENUE SAN FRANCISCO,CA 94129				
ULTRAVIOLET EDUCATION FUND PO BOX 92592 WASHINGTON,DC 20090	NONE	501(C)(3)	#REPRO RECEIPTS PROPOSAL	25,000
VOICE OF CALVARY MINISTRIES 531 W CAPITOL ST JACKSON,MS 39203	NONE	501(C)(3)	COOPERATIVE COMMUNITY OF NEW WEST JACKSON	25,000
WE2GETHER CREATING CHANGE 167 N MAIN ST DREW,MS 38737	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	125,000
WIN WITHOUT WAR EDUCATION FUND 1 THOMAS CIRCLE NW SUITE 700 WASHINGTON,DC 20005	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	5,000
AMERICAN CIVIL LIBERTIES UNION 125 BROAD STREET NEW YORK,NY 10004	NONE	501(C)(3)	AMBASSADOR DISCRETIONARY - GENERAL OPERATING SUPPORT/UNRESTRICTED	10,000
PLANNED PARENTHOOD SOUTH ATLANTIC STATES 100 SOUTH BOYLAN AVE RALEIGH,NC 27603	NONE	501(C)(3)	AMBASSADOR - GENERAL OPERATING SUPPORT/UNRESTRICTED	20,000
THE LAVENDER FUND 1120 19TH STREET NW STE 820 WASHINGTON,DC 20036	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	200,000
Total			▶ 3a	7,368,500
b <i>Approved for future payment</i>				
RHIA VENTURES 47 KEARNY ST STE 600 SAN FRANCISCO,CA 94108	NONE	501(C)(3)	OASIS INSTITUTE	250,000
WE2GETHER CREATING CHANGE 167 N MAIN ST DREW,MS 38737	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	125,000
TEEN HEALTH MISSISSIPPI 125 S CONGRESS ST STE 1330 JACKSON,MS 39201	NONE	501(C)(3)	GENERAL OPERATING SUPPORT/UNRESTRICTED	50,000
Total			▶ 3b	425,000

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

- 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
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
9 Net income or (loss) from special events:
10 Gross profit or (loss) from sales of inventory
11 Other revenue:
a OTHER INCOME
b
c
d
e

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Includes rows for various income categories and a total row at the bottom.

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

Table with 2 columns: 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.

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: TARA HEALTH FOUNDATION

EIN: 46-5645300

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	42,260	0		0

TY 2024 IRS 990 e-File Render

Name: TARA HEALTH FOUNDATION

EIN: 46-5645300

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MERRILL LYNCH - SECURITIES AT FMV	FMV	22,034,372	22,034,372
NEXT WAVE IMPACT FUND I (PRIVATE EQUITY FUND)	FMV	202,266	202,266
PRIVATE FUND INVESTMENTS	FMV	5,763,784	5,763,784

TY 2024 IRS 990 e-File Render

Name: TARA HEALTH FOUNDATION

EIN: 46-5645300

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	2,217	0		887

TY 2024 IRS 990 e-File Render

Name: TARA HEALTH FOUNDATION

EIN: 46-5645300

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ACCRUED INTEREST	17,905	18,524	18,524
SECURITY DEPOSIT	25,597	25,597	25,597
SECURITY TRANSACTIONS IN TRANSIT	0	1,500,000	1,500,000

TY 2024 IRS 990 e-File Render

Name: TARA HEALTH FOUNDATION

EIN: 46-5645300

Description	Amount
GAAP FMV ADJUST - UNREALIZED GAIN/LOSS	5,177,280

TY 2024 IRS 990 e-File Render

Name: TARA HEALTH FOUNDATION

EIN: 46-5645300

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT EXPENSES	135,164	135,164		0
D&O INSURANCE	5,280	0		0
WORKERS COMPENSATION	2,450	0		1,746
STATE DISABILITY INSURANCE	392	0		0
BUSINESS REGISTRATION FEES	25	0		0
MEMBERSHIPS	29,550	0		29,550
WEBSITE	252	0		0
WIRE TRANSFER FEES	1,065	0		0
BOOKS, SUBSCRIPTIONS, REFERENCES	2,639	0		0
POSTAGE, MAILING SERVICE	217	0		155
PRINTING & COPYING	2,742	0		1,955
SUPPLIES	18,404	0		13,119
TELEPHONE & TELECOM	14,715	0		10,490
FILING FEES	267	0		0
COMMISSION / TRADING FEES	155	0		0
ANNUAL STATEMENT FEE	300	0		0
PROGRAM LOAN FORGIVENESS	1,487,400	0		1,487,400

TY 2024 IRS 990 e-File Render

Name: TARA HEALTH FOUNDATION

EIN: 46-5645300

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	981		981

TY 2024 IRS 990 e-File Render

Name: TARA HEALTH FOUNDATION

EIN: 46-5645300

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED EXCISE TAX LIABILITY	176,439	66,914
OPERATIONS LOAN	7,272,000	0
FEDERAL EXCISE TAX LIABILITY	18,424	8,424

TY 2024 IRS 990 e-File Render

Name: TARA HEALTH FOUNDATION

EIN: 46-5645300

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTANTS	2,260,309	0		2,228,940
FOUNDATION MANAGEMENT	379,992	0		0
IT SUPPORT	3,021	0		0

TY 2024 IRS 990 e-File Render

Name: TARA HEALTH FOUNDATION

EIN: 46-5645300

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	15,474	0		0