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
Annie E Casey Foundation Inc

A Employer identification number
52-1951681

Number and street (or P.O. box number if mail is not delivered to street address)
701 St Paul Street

Room/suite

B Telephone number (see instructions)
(410) 547-6600

City or town, state or province, country, and ZIP or foreign postal code
Baltimore, MD 212022311

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)* ▶$ 3,468,447,673

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)	2,205,098			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	9,122,804	9,122,804		
	4	Dividends and interest from securities	28,916,783	28,916,783		
	5a	Gross rents	1,025,501	1,025,501		
	b	Net rental income or (loss) 1,025,501				
	6a	Net gain or (loss) from sale of assets not on line 10	50,634,448			
	b	Gross sales price for all assets on line 6a 222,554,677				
	7	Capital gain net income (from Part IV, line 2)		82,257,727		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances 0				
	b	Less: Cost of goods sold 0				
	c	Gross profit or (loss) (attach schedule)	0			
	11	Other income (attach schedule)	72,155,331	77,816,302	0	
	12	**Total.** Add lines 1 through 11	164,059,965	199,139,117	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	3,832,419	936,407		2,721,012
	14	Other employee salaries and wages	27,418,655	2,777,493		24,816,162
	15	Pension plans, employee benefits	10,506,003	562,153		9,943,850
	16a	Legal fees (attach schedule)	667,446	394,200	0	273,246
	b	Accounting fees (attach schedule)	658,643	132,209	0	526,434
	c	Other professional fees (attach schedule)	12,757,276	6,218,967	0	6,538,309
	17	Interest	1,130,767	248,963		881,804
	18	Taxes (attach schedule) (see instructions)	0	828,684	0	0
	19	Depreciation (attach schedule) and depletion	2,840,994	1,994,022	0	
	20	Occupancy	3,933,433	664,897		3,268,536
	21	Travel, conferences, and meetings	3,642,547	125,683		3,516,863
	22	Printing and publications	118,199	4,057		114,142
	23	Other expenses (attach schedule)	22,234,491	541,799	0	22,932,794
	24	**Total operating and administrative expenses.** Add lines 13 through 23	89,740,873	15,429,534	0	75,533,152
	25	Contributions, gifts, grants paid	93,091,674			93,029,674
	26	**Total expenses and disbursements.** Add lines 24 and 25	182,832,547	15,429,534	0	168,562,826
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-18,772,582			
	b	**Net investment income** (if negative, enter -0-)		183,709,583		
	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	49,430,476	81,952,954	81,952,954
	2	Savings and temporary cash investments	167,353,972	64,830,510	64,789,201
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶	0	0	0
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶	0	0	0
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)	0	0	0
	7	Other notes and loans receivable (attach schedule) ▶ 0			
		Less: allowance for doubtful accounts ▶ 0	0	0	0
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	0		
	10a	Investments—U.S. and state government obligations (attach schedule)	123,345,170	142,452,265	128,528,163
	b	Investments—corporate stock (attach schedule)	251,059,519	254,107,731	603,009,095
	c	Investments—corporate bonds (attach schedule)	79,047,997	89,936,450	83,191,716
	11	Investments—land, buildings, and equipment: basis ▶ 0			
		Less: accumulated depreciation (attach schedule) ▶ 0	0		0
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,574,555,472	1,498,133,956	2,328,235,260
	14	Land, buildings, and equipment: basis ▶ 67,602,641			
		Less: accumulated depreciation (attach schedule) ▶ 38,030,551	31,629,053	29,572,090	29,572,090
	15	Other assets (describe ▶)	57,411,277	126,166,288	149,169,194
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,333,832,936	2,287,152,244	3,468,447,673
Liabilities	17	Accounts payable and accrued expenses	12,776	221,842	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21	Mortgages and other notes payable (attach schedule)	40,530,626	14,173,426	
	22	Other liabilities (describe ▶)	7,508,348	5,601,428	
	23	**Total liabilities**(add lines 17 through 22)	48,051,750	19,996,696	
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	2,285,781,186	2,267,155,548	
	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)	2,285,781,186	2,267,155,548	
	30	**Total liabilities and net assets/fund balances** (see instructions)	2,333,832,936	2,287,152,244	

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	2,285,781,186
2	Enter amount from Part I, line 27a	2	-18,772,582
3	Other increases not included in line 2 (itemize) ▶	3	146,944
4	Add lines 1, 2, and 3	4	2,267,155,548
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	2,267,155,548

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	SHORT-TERM PUBLICLY TRADED STOCKS CAPITAL GAIN			
b	LONG-TERM NONPUBLICLY TRADED STOCKS CAPITAL GAIN			
c	LONG-TERM PUBLICLY TRADED STOCKS CAPITAL LOSS			
d	CAPITAL GAIN/(LOSS) FROM PASS-THROUGH			
e	Section 721(b) gain			

	(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	73,708,129		62,596,086	11,112,043
b	44,515		76,509	-31,994
c	85,843,502		87,733,686	-1,890,184
d	62,958,532		0	62,958,532
e	10,109,330		0	10,109,330

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			0	11,112,043
b			0	-31,994
c			0	-1,890,184
d			0	62,958,532
e			0	10,109,330

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	82,257,727
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ **(attach copy of letter if necessary–see instructions)**			1	2,553,563
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	2,553,563
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	2,553,563
6	Credits/Payments:				
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	1,490,000		
b	Exempt foreign organizations—tax withheld at source	6b	0		
c	Tax paid with application for extension of time to file (Form 8868)	6c	2,270,000		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments. Add lines 6a through 6d			7	3,760,000
8	Enter any **penalty** for underpayment of estimated tax. Check here ☑ if Form 2220 is attached.			8	34,347
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	1,172,090
11	Enter the amount of line 10 to be: **Credited to 2025 estimated tax** ▶ 1,172,090	**Refunded** ▶		11	0

Part VI-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ _____ **(2)** On foundation managers. ▶ $ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ _____			
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, DC, GA, MD			
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		No
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? Website address ▶WWW.AECF.ORG	13	Yes	
14	The books are in care of ▶ANNIE E CASEY FOUNDATION INC Telephone no. ▶(410) 547-6600 Located at ▶701 St Paul Street Baltimore MD ZIP+4 ▶212022311			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year	15		
16	At any time during calendar year 2024, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶	16	Yes	No

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	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)	Yes	
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	Yes	
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	Yes	
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		No
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?	5d	Yes	
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a		No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment during the year?	8		No

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
D SCOTT DAVIS 701 St Paul Street Baltimore, MD 212022311	TRUSTEE, VICE CHAIR, TREASURER 2.00	0	0	
DAVID ABNEY 701 St Paul Street Baltimore, MD 212022311	TRUSTEE 2.00	0	0	
DIANA M BONTA 701 St Paul Street Baltimore, MD 212022311	TRUSTEE 1.50	35,000	0	
DR DAVID NICHOLS 701 St Paul Street Baltimore, MD 212022311	TRUSTEE 1.00	35,000	0	
GABRIELLA E MORRIS 701 St Paul Street Baltimore, MD 212022311	TRUSTEE 1.00	35,000	0	
JAMES F WINESTOCK 701 St Paul Street Baltimore, MD 212022311	TRUSTEE, SECRETARY 1.50	0	0	
MAURICE AGRESTA 701 St Paul Street Baltimore, MD 212022311	TRUSTEE 1.50	0	0	
MICHAEL L ESKEW 701 St Paul Street Baltimore, MD 212022311	TRUSTEE, CHAIRPERSON 2.50	0	0	
SAM J ZAMARRIPA 701 St Paul Street Baltimore, MD 212022311	TRUSTEE 2.00	35,000	0	
Steve Bullock 701 St Paul Street Baltimore, MD 212022311	Trustee 1.50	35,000	0	
SUSAN WARD 701 St Paul Street Baltimore, MD 212022311	TRUSTEE 1.50	0	0	
TERESA M FINLEY 701 St Paul Street Baltimore, MD 212022311	TRUSTEE 1.50	0	0	
NORMAN BROTHERS 701 St Paul Street Baltimore, MD 212022311	TRUSTEE (ELECTED JUNE 2024) 1.00	0	0	
LISA M LAWSON 701 St Paul Street Baltimore, MD 212022311	TRUSTEE, PRESIDENT, ASSISTANT SECRETARY & ASSISTANT TREASURER 50.00	914,246	72,889	
ALEXANDER PERRY 701 St Paul Street Baltimore, MD 212022311	VICE PRESIDENT & Chief Investment Officer 50.00	851,856	84,551	
JOHN KIM 701 St Paul Street Baltimore, MD 212022311	VICE PRESIDENT & CHIEF ADMINISTRATIVE OFFICER 50.00	527,515	83,068	
KATHERINE TETRAULT 701 St Paul Street Baltimore, MD 212022311	VICE PRESIDENT, FINANCE & GRANTS MANAGEMENT 50.00	433,660	81,036	
KIMBERLEY BROWN 701 St Paul Street Baltimore, MD 212022311	VICE PRESIDENT, HUMAN RESOURCES 50.00	352,730	80,868	
CHANTELL GLENN 701 St Paul Street Baltimore, MD 212022311	MANAGER, SECRETARY (352 University Avenue Associates LLC) 3.00	0	0	
KARA COOPER 701 St Paul Street Baltimore, MD 212022311	MANAGER (352 University Avenue Associates LLC) 3.00	0	0	
KWEKU FORSTALL 701 St Paul Street Baltimore, MD 212022311	MANAGER, VICE PRESIDENT (352 University Avenue Associates LLC) 3.00	0	0	
THOMASINA HIERS 701 St Paul Street Baltimore, MD 212022311	Manager, President/Treasurer (352 University Avenue Associates LLC) 3.00	437,462	71,419	
SOPHIE DAGENAIS 701 St Paul Street Baltimore, MD 212022311	MANAGER (352 University Avenue Associates LLC) 3.00	0	0	
TRACY KARTYE 701 St Paul Street Baltimore, MD 212022311	MANAGER (352 University Avenue Associates LLC) 3.00	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
SAMUEL NORVELL 701 St Paul Street Baltimore, MD 212022311	Director 50.00	519,921	81,846	
SARA EDMONDSON 701 St Paul Street Baltimore, MD 212022311	Director 50.00	458,773	73,497	
LESLIE BOISSIERE 701 St Paul Street Baltimore, MD 212022311	Vice President 50.00	444,902	70,539	
CHARLES GARBER 701 St Paul Street Baltimore, MD 212022311	Director 50.00	422,801	59,033	
SANDRA GASCA 701 St Paul Street Baltimore, MD 212022311	VICE PRESIDENT 50.00	406,832	60,269	

Total number of other employees paid over $50,000 ▶ 196

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
ADAGE CAPITAL PARTNERS LP 200 CLARENDON ST 52ND FLOOR BOSTON, MA 02116	INVESTMENT CONSULTING SERVICES	1,310,329
FENTON COMMUNICATIONS INC 244 Madison Ave Suite 307 NEW YORK, NY 10016	PUBLIC RELATIONS	1,039,750
MADDY DAY LLC 7896 PRESQUE ISLE DRIVE KALAMAZOO, MI 49009	SUPPORT SERVICES FOR THE FAMILY WELFARE STRATEGY GROUP	1,037,783
CBRE Inc 100 E Pratt St 1700 BALTIMORE, MD 21202	Property Management	1,037,620
James Bell Associates Inc 3033 Wilson Boulevard Suite 650 Arlington, VA 22201	Support for the Research and Evaluation Strategy	1,031,351

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

150

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 Child Welfare System Reform and Prevention - Increase community-based programs and services that address family needs early on, ensure children's safety and avoid entry into the child welfare system. Assist child welfare agencies with employing practices that will keep families together, place more children with relatives and end the use of group homes for kids and teens.	5,477,977
2 Juvenile Justice System Reform - Promote policies, practices and programs that seek to prevent young people from entering the juvenile justice system or experiencing unnecessary incarceration and other forms of out-of-home placement. The goal is to ensure youth live in stable, supportive families and can successfully transition to adulthood.	4,440,581
3 Strategic Communications - Support the development of effective messages and media platforms that build understanding, share lessons, align allies, move potential partners and convert critics to ensure all children and youth in America can reach their full potential.	3,755,005
4 Leadership Development - Build the skills of social sector leaders to accelerate improved outcomes for children, families, and communities. Pursue opportunities to influence others to take up Results Count leadership and spread these tools and skills throughout their organizations, networks, and spheres of influence.	3,000,150

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 Care Investment Partners LP: The Foundation funded an investment in Care Investment Partners, LP. The purpose of the investment is to expand the supply of quality child care, especially for overlooked and under-resourced families and communities, by purchasing and developing properties for child care centers.	3,000,000
2 Washington Housing Conservancy: The Foundation funded a loan to The Washington Housing Conservancy, Inc., an organization that preserves affordable multi-family rental apartment buildings to support the economic mobility of low-to moderate-income residents.	2,000,000
All other program-related investments. See instructions. **3**	4,519,490
Total. Add lines 1 through 3 . . . . . ▶	9,519,490

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	1,003,512,522
b	Average of monthly cash balances			1b	30,629,937
c	Fair market value of all other assets (see instructions)			1c	2,310,933,774
d	**Total** (add lines 1a, b, and c)			1d	3,345,076,233
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	
3	Subtract line 2 from line 1d			3	3,345,076,233
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)			4	50,176,143
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3			5	3,294,900,090
6	**Minimum investment return.** Enter 5% (0.05) of line 5			6	164,745,005

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	164,745,005
2a	Tax on investment income for 2024 from Part V, line 5	2a	2,553,563		
b	Income tax for 2024. (This does not include the tax from Part V.)	2b			
c	Add lines 2a and 2b			2c	2,553,563
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	162,191,442
4	Recoveries of amounts treated as qualifying distributions			4	1,377,697
5	Add lines 3 and 4			5	163,569,139
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1			7	163,569,139

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	168,562,826
b	Program-related investments—total from Part VIII-B	1b	9,519,490
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	784,030
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	0
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part XII, line 4	4	178,866,346

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				163,569,139
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.			0	
b Total for prior years: 2022, 2021, 2020		0		
3 Excess distributions carryover, if any, to 2024:				
a From 2019. 41,874,681				
b From 2020. 25,551,377				
c From 2021. 0				
d From 2022. 0				
e From 2023. 1,177,554				
f **Total** of lines 3a through e	68,603,612			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ $ 178,866,346				
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				163,569,139
e Remaining amount distributed out of corpus	15,297,207			
5 Excess distributions carryover applied to 2024. *(If an amount appears in column (d), the same amount must be shown in column (a).)*				0
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	83,900,819			
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				
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) . . .	41,874,681			
9 **Excess distributions carryover to 2025.** Subtract lines 7 and 8 from line 6a	42,026,138			
10 Analysis of line 9:				
a Excess from 2020 25,551,377				
b Excess from 2021 0				
c Excess from 2022. . . . 0				
d Excess from 2023 1,177,554				
e Excess from 2024 15,297,207				

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).)

NONE

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.

NONE

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			14	9,122,804	
4 Dividends and interest from securities			14	28,916,783	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property			30	1,025,501	
6 Net rental income or (loss) from personal property					
7 Other investment income	523000	15,948,588	14	48,503,156	
8 Gain or (loss) from sales of assets other than inventory	523000	4,221,215	18	46,413,233	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a PRIOR YEAR GRANTS & DCA RECOVERIES					200,537
b NMTC GAIN					7,503,050
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		20,169,803		133,981,477	7,703,587
13 **Total.** Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				13	161,854,867

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)	Yes	
(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
1a(1)	50,000	Appalachian Community Capital Corporation	Support the regional Rural Investment Collaboration
1a(1)	25,000	Atlanta Aerotropolis Alliance Inc	Support to improve the economic viability and impact of the region surrounding Atlanta's Hartsfield-Jackson International Airport
1a(1)	70,000	Children's Alliance of Kansas Inc	Support implementation of SOUL Family
1a(1)	62,000	Indiana Youth Institute Inc	Support various KIDS COUNT activities

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 2025-11-17 — 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
Nicole Bencik		2025-11-17		P00756195

Firm's name ▶ CROWE LLP — Firm's EIN ▶ 35-0921680

Firm's address ▶ 401 E Jackson St Suite 2900, Tampa, FL 336025231 — Phone no. (813) 223-1316

Additional Data

Return to Form

Software ID: 24020961
Software Version: 2024v5.1

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B
(Form 990)
(Rev. January 2025)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

Name of the organization	Employer identification number
Annie E Casey Foundation Inc	52-1951681

Organization type (check one):

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

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

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

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

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

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

Name of organization	Employer identification number
Annie E Casey Foundation Inc	52-1951681

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	Casey JE FBO Betty L Buckley-TR BNYMELLON NA 500 Grant St Pittsburgh, P A 152580001	$ 2,202,500	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
Annie E Casey Foundation Inc

Employer identification number
52-1951681

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

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

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

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

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

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

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

Name of organization
Annie E Casey Foundation Inc

Employer identification number
52-1951681

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: 24020961

Software Version: 2024v5.1

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING & DATA PROCESSING	139,910	132,209		7,701
AUDIT & TAX PREPARATION FEES	518,733			518,733

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Category	Amount
Corporation for Supportive Housing Solution Fund	1,578,000
Inclusiv Inc	1,500,000
Renters Wealth Creation	1,203,886
Impact America Fund II	128,272
Coastal Ventures V LP	100,000
Atlanta Affordable Housing	9,332

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc
EIN: 52-1951681
Software ID: 24020961
Software Version: 2024v5.1

Person Name	Explanation
CHANTELL GLENN	THIS INDIVIDUAL SERVES AS AN OFFICER OF A DISREGARDED ENTITY CONTROLLED BY THE FOUNDATION AND IS NOT COMPENSATED FOR THIS ROLE. IN ADDITION, THE INDIVIDUAL IS EMPLOYED BY THE ANNIE E. CASEY FOUNDATION AND RECEIVES ANNUAL COMPENSATION RELATED TO THEIR EMPLOYMENT. THE COMPENSATION ASSOCIATED WITH THEIR EMPLOYMENT WOULD NOT PLACE THEM AMONG THE FOUNDATION'S FIVE HIGHEST COMPENSATED EMPLOYEES. THEREFORE, THE INDIVIDUAL'S COMPENSATION IS NOT REPORTED IN PART VII.
KARA COOPER	THIS INDIVIDUAL SERVES AS AN OFFICER OF A DISREGARDED ENTITY CONTROLLED BY THE FOUNDATION AND IS NOT COMPENSATED FOR THIS ROLE.
KWEKU FORSTALL	THIS INDIVIDUAL SERVES AS AN OFFICER OF A DISREGARDED ENTITY CONTROLLED BY THE FOUNDATION AND IS NOT COMPENSATED FOR THIS ROLE. IN ADDITION, THE INDIVIDUAL IS EMPLOYED BY THE ANNIE E. CASEY FOUNDATION AND RECEIVES ANNUAL COMPENSATION RELATED TO THEIR EMPLOYMENT. THE COMPENSATION ASSOCIATED WITH THEIR EMPLOYMENT WOULD NOT PLACE THEM AMONG THE FOUNDATION'S FIVE HIGHEST COMPENSATED EMPLOYEES. THEREFORE, THE INDIVIDUAL'S COMPENSATION IS NOT REPORTED IN PART VII.
THOMASINA HIERS	THIS INDIVIDUAL SERVES AS AN OFFICER OF A DISREGARDED ENTITY CONTROLED BY THE FOUNDATION AND IS NOT COMPENSATED FOR THIS ROLE. IN ADDITION, THE INDIVIDUAL IS EMPLOYED AS A VICE PRESIDENT OF THE ANNIE E. CASEY FOUNDATION AND RECEIVES ANNUAL COMPENSATION RELATED TO THAT POSITION. IF THE INDIVIDUAL WERE NOT A REPORTABLE OFFICER OF THE DISREGARDED ENTITY, THE COMPENSATION ASSOCIATED WITH THEIR ROLE AS VICE PRESIDENT WOULD PLACE THEM AMONG THE FOUNDATION'S FIVE HIGHEST COMPENSATED EMPLOYEES. BECAUSE OF THIS, THE INDIVIDUAL'S COMPENSATION HAS BEEN REPORTED IN PART VII FOR THE SAKE OF TRANSPARENCY.
SOPHIE DAGENAIS	THIS INDIVIDUAL SERVES AS AN OFFICER OF A DISREGARDED ENTITY CONTROLLED BY THE FOUNDATION AND IS NOT COMPENSATED FOR THIS ROLE.
TRACY KARTYE	THIS INDIVIDUAL SERVES AS AN OFFICER OF A DISREGARDED ENTITY CONTROLLED BY THE FOUNDATION AND IS NOT COMPENSATED FOR THIS ROLE. IN ADDITION, THE INDIVIDUAL IS EMPLOYED BY THE ANNIE E. CASEY FOUNDATION AND RECEIVES ANNUAL COMPENSATION RELATED TO THEIR EMPLOYMENT. THE COMPENSATION ASSOCIATED WITH THEIR EMPLOYMENT WOULD NOT PLACE THEM AMONG THE FOUNDATION'S FIVE HIGHEST COMPENSATED EMPLOYEES. THEREFORE, THE INDIVIDUAL'S COMPENSATION IS NOT REPORTED IN PART VII.

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: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
BUILDINGS AND IMPROVEMENTS		58,274,277	31,043,755			2,605,888	1,037,629	0	
FURNITURE AND FIXTURES		625,284	570,533			2,354	0	0	
COMPUTER AND OFFICE EQUIPMENT		4,598,739	3,714,244			174,984	0	0	
LEASEHOLD IMPROVEMENTS		577,673	202,265			57,768	0	0	
Depletion from Partnerships		0	0			0	956,393	0	

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: Annie E Casey Foundation Inc
EIN: 52-1951681
Software ID: 24020961
Software Version: 2024v5.1

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
BRIDGES VENTURES US SUSTAINABLE GROWTH FUND LP	75 E MAIN STREET SUITE 620 STAMFORD, CT 06902	2015-07-31	2,000,000	SUPPORT COMPANIES CREATING EMPLOYMENT OPPORTUNITIES IN U.S. SMALL AND MEDIUM BUSINESSES THAT DELIVER SOLUTIONS TO PRESSING SOCIAL CHALLENGES	0	No	3/6/2024, 8/14/2024, 11/14/2024		EACH YEAR THE FOUNDATION HAS RECEIVED REQUIRED FINANCIAL INFORMATION FROM THE ORGANIZATION FROM 2015 THROUGH 2024. ALL REPORTS ARE AVAILABLE UPON REQUEST. THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
SUN INITIATIVE FINANCING LLC	10 MALCOLM X BOULEVARD BOSTON, MA 02119	2017-01-27	2,000,000	SUPPORT NEIGHBORHOOD STABILITY THROUGH A FORECLOSURE PREVENTION FUND	0	No	03/16/2023		Reports from the Grantee are past due, but the Foundation is making reasonable efforts to obtain the required reports. Until such time that the reports are received, the Foundation will not make future payments to this Grantee on this grant or other grants, or make any new grants to this Grantee until such outstanding report(s) are furnished. However based upon the Foundation's on-going interactions with the Grantee, the Foundation has no reason to believe that any grant funds have been diverted from the original purposes of the grant.
ACTA NON VERBA YOUTH URBAN FARM PROJECT	1001 83RD STREET MAILBOX 1 OAKLAND, CA 94621	2019-05-01	25,000	SUPPORT FOR THE MANDELA GROCERY COOPERATIVE	0	No	n/a		Reports from the Grantee are past due, but the Foundation is making reasonable efforts to obtain the required reports. Until such time that the reports are received, the Foundation will not make future payments to this Grantee on this grant or other grants, or make any new grants to this Grantee until such outstanding report(s) are furnished. However based upon the Foundation's on-going interactions with the Grantee, the Foundation has no reason to believe that any grant funds have been diverted from the original purposes of the grant.
IMPACT AMERICA FUND II LP	2323 BROADWAY OAKLAND, CA 94612	2019-09-25	1,000,000	SUPPORT EARLY STAGE COMPANIES REACHING UNDERSERVED COMMUNITIES TO ADDRESS PRESSING SOCIAL CHALLENGES	128,272	No	8/8/2024, 11/14/2024, 3/24/2025		Each year the Foundation has received required financial information from the organization from 2019 through 2024. All reports are available upon request. THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
GREATER NEWARK ENTERPRISES CORPORATION	211 WARREN STREET SUITE 423 NEWARK, NJ 07103	2019-11-01	100,000	SUPPORT PHASE 1 TO DEVELOP A PRECISION ANALYTICS MODEL FOR A SINGLE CHILD WELFARE GRANTEE	33,495	No	9/22/2020, 3/16/2021, 12/21/2022, 4/12/2024		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
INSTITUTE FOR POLICY STUDIES	1301 CONNECTICUT AVE NW SUITE 600 WASHINGTON, DC 20036	2020-11-01	20,000	SUPPORT FOR BALTIMORE BROTHERS PROGRAMMING AND OUTREACH	0	No	n/a		Reports from the Grantee are past due, but the Foundation is making reasonable efforts to obtain the required reports. Until such time that the reports are received, the Foundation will not make future payments to this Grantee on this grant or other grants, or make any new grants to this Grantee until such outstanding report(s) are furnished. However based upon the Foundation's on-going interactions with the Grantee, the Foundation has no reason to believe that any grant funds have been diverted from the original purposes of the grant.
SAVE OURSELVES	6545 HIDDEN BROOK TRAIL COLLEGE PARK, GA 30349	2020-11-01	117,650	Support for Southern leadership and advocacy pilot project	117,650	No	9/23/2021, 10/9/2025		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
MICHIGAN FUTURE INC	1 WOODWARD AVENUE SUITE 1900 DETROIT, MI 48226	2020-12-01	75,000	SUPPORT MICHIGAN FUTURE TO DEVELOP A RESULTS ACTION PLAN TO CATALYZE MICHIGAN PUBLIC POLICY	75,000	No	1/3/2022, 11/7/2025		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
ATLANTA AFFORDABLE HOUSING FUND LP	3340 PEACHTREE ROAD NE SUITE 1400 ATLANTA, GA 30326	2021-10-01	2,000,000	SUPPORT SOCIAL RETURNS TO COMMUNITIES BY PROVIDING AFFORDABLE HOUSING	9,332	No	7/18/2024, 9/19/2025		EACH YEAR THE FOUNDATION HAS RECEIVED REQUIRED FINANCIAL INFORMATION FROM THE ORGANIZATION FROM 2021 THROUGH 2024. ALL REPORTS ARE AVAILABLE UPON REQUEST. THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
SISTERS OF CHARITY FOUNDATION OF CLEVELAND	2475 E 22ND STREET CLEVELAND, OH 44115	2021-12-01	75,000	SUPPORT CUYAHOGA COUNTY JIM CASEY INITIATIVE SITE LEAD	75,000	No	10/9/2025		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
NATION BUILDERS CONFERENCE INC	1025 CROOKED CREEK COURT MABLETON, GA 30126	2022-05-11	5,000	SUPPORT OUT-OF-SCHOOL PATHWAY PROGRAMMING IN NPU-V SCHOOLS	5,000	No	07/21/2025		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
BSD CAPITAL INC DBA LENDISTRY	777 S ALAMEDA STREET 2ND FLOOR LOS ANGELES, CA 90021	2022-05-25	3,000,000	SUPPORT EARLY STAGE COMPANIES REACHING UNDERSERVED COMMUNITIES TO ADDRESS PRESSING SOCIAL CHALLENGES	0	No	2024-08-30T00:00:00		EACH YEAR THE FOUNDATION HAS RECEIVED REQUIRED FINANCIAL INFORMATION FROM THE ORGANIZATION FROM 2022 THROUGH 2024. ALL REPORTS ARE AVAILABLE UPON REQUEST. THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
COASTAL VENTURES V LP	30 FEDERAL STREET STE 400 BRUNSWICK, ME 04011	2022-07-18	1,000,000	SUPPORT SOCIAL RETURNS TO THE COMMUNITIES AROUND ITS PORTFOLIO COMPANIES	100,000	No	5/16/2024, 8/21/2024, 2/14/2025, 7/30/2025		Each year the Foundation has received required financial information from the organization from 2022 through 2024. All reports are available upon request. THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
PROGRESSNOW EDUCATION	POB 664 EARLYVILLE, VA 22936	2023-01-05	25,000	SUPPORT POLICY ADVOCACY TO ADVANCE JUVENILE JUSTICE REFORMS IN MARYLAND	25,000	No	2023-09-02T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
CASE COMMONS INC	104 W 27TH STREET 8TH FLOOR NEW YORK, NY 10001	2023-03-30	79,000	SUPPORT LEGAL AND RELATED COSTS	79,000	No	2023-12-21T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
PHILANTHROPIC VENTURES FOUNDATION	1222 PRESERVATION PARK WAY OAKLAND, CA 94612	2023-04-27	78,125	SUPPORT BUILDING ORGANIZATIONAL RESILIENCE FOR ATLANTA NONPROFITS	78,125	No	2024-08-27T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
CENTER FOR CIVIC POLICY	PO BOX 27616 ALBUQUERQUE, NM 87125	2023-07-24	60,000	SUPPORT NEW MEXICO DREAM TEAM (NMDT)	60,000	No	2/15/2024, 7/2/2024		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
THE HATCHER GROUP INC	7600 WISCONSIN AVE SUITE 1000 BETHESDA, MD 20814	2023-09-01	75,000	SUPPORT THE TAX CREDITS FOR WORKERS AND THEIR FAMILIES	75,000	No	2024-03-12T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
PROGRESSNOW EDUCATION	POB 664 EARLYVILLE, VA 22936	2023-11-03	90,000	SUPPORT POLICY ADVOCACY TO ADVANCE JUVENILE JUSTICE REFORMS IN MARYLAND	90,000	No	2024-06-04T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
COLLECTIVE ACTION FOR YOUTH	6300 CHIMNEY ROCK RD HOUSTON, TX 77081	2023-11-15	58,750	SUPPORT STIPEND FOR JJSG CONFERENCE ATTENDANCE FOR YOUNG PEOPLE, FAMILIES, AND COMMUNITY PARTNERS	30,160	No	5/1/2025, 4/12/2024		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
B U I L D INCORPORATED	5100 W HARRISON ST CHICAGO, IL 60644	2023-11-29	30,000	SUPPORT THE WORK OF STICK TALK	30,000	No	2024-06-04T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
ALLIANCE FOR YOUTH ORGANIZING	915 5TH STREET NW WASHINGTON, DC 20001	2023-12-05	27,000	SUPPORT CAPACITY BUILDING FOR THE GEORGIA YOUTH JUSTICE COALITION TO INCORPORATE YOUNG ADULT VOICE INTO YEAR ROUND CIVIC ENGAGEMENT PROGRAMS.	27,000	No	10/13/2025		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
B U I L D INCORPORATED	5100 W HARRISON ST CHICAGO, IL 60644	2023-12-07	80,000	SUPPORT TO SCALE HOLDING SPACE - STICK TALK HUBS	80,000	No	2024-11-18T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Appalachian Community Capital Corporation	110 Peppers Ferry Road NW Christiansburg, VA 24073	2024-01-16	25,000	Support the regional Rural Investment Collaboration	25,000	No	4/12/2024, 11/25/2024		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Business Capacity Development Alliance	147 Prince St Ste 319 Brooklyn, NY 11201	2024-02-26	25,000	Support Canary Impact Prize winners	25,000	No	2024-12-02T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Atlanta Aerotropolis Alliance Inc	3800 Camp Creek Parkway SW Building 1400 Suite 132 Atlanta, GA 30331	2024-03-01	25,000	Support to improve the economic viability and impact of the region surrounding Atlanta's Hartsfield-Jackson International Airport	25,000	No	2025-01-27T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Restorative Response Baltimore Inc	1500 Union Avenue Suite 2700 Baltimore, MD 21211	2024-04-16	30,000	Support A Revolutionary Summer 2023 for the Summer Funding Collaborative	30,000	No	2024-04-15T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Children's Alliance of Kansas Inc	627 SW Topeka Blvd Topeka, KS 66603	2024-04-19	70,000	Support implementation of SOUL Family	70,000	No	2025-02-06T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Foster Forward	55 South Brow Street East Providence, RI 02914	2024-04-19	40,000	Support the Youth Transition Funders Group's Economic Well-Being Group	40,000	No	2025-02-05T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Indiana Youth Institute Inc	55 Monument Circle Suite 201 Indianapolis, IN 46204	2024-04-19	60,000	Support various KIDS COUNT activities	60,000	No	2025-01-30T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Foster Forward	55 South Brow Street East Providence, RI 02914	2024-05-02	100,000	Support Youth Transition Funders Group	100,000	No	2025-02-10T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
CARE INVESTMENT PARTNERS LP	2247 SAN DIEGO AVE STE 135 SAN DIEGO, CA 92110	2024-05-07	3,000,000	SUPPORT SOCIAL RETURNS TO THE COMMUNITIES AROUND ITS PORTFOLIO CHILD CARE INVESTMENTS	3,000,000	No	5/29/2024, 6/12/2024, 5/30/2025		IN THE LOAN'S FIRST YEAR THE FOUNDATION HAS RECEIVED REQUIRED FINANCIAL INFORMATION FROM THE ORGANIZATION. ALL REPORTS ARE AVAILABLE UPON REQUEST. THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Greater Image	3860 Virgil Blvd New Orleans, LA 70122	2024-06-14	7,500	Support for 4 Social Peace's Digital Community Violence Response	7,500	No	2024-12-02T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
ProgressNow Education	POB 664 Earlyville, VA 22936	2024-07-16	75,000	Support policy advocacy and strategic communications to advance juvenile justice reforms in Maryland	75,000	No	2025-07-21T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Cure Violence Atlanta	960 MARTIN LUTHER KING JR DR SW Atlanta, GA 30314	2024-08-16	80,000	Support for HOPE Hustler's Peace Mobile	80,000	No	2025-05-13T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Veterans 231st Transportation Truck Battalion Inc	1401 Severn Street Suite A101 Baltimore, MD 21230	2024-08-16	150,000	Support VETWorkS Electric Vehicle (EV) Future Proof Me Workforce Development Training Program	150,000	No	2025-06-12T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Center for Civic Policy	PO Box 27616 Albuquerque, NM 87125	2024-09-04	60,000	Support New Mexico Dream Team	60,000	No	2025-07-22T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
RENTERS WEALTH CREATION FUND LLC	70 Corporate Center 11000 Broken L Ste 700 COLUMBIA, MD 21044	2024-10-02	3,000,000	SUPPORT SOCIAL RETURNS TO COMMUNITIES THROUGH PRESERVATION OF AFFORDABLE HOUSING	1,203,885	No	10/2/2024, 12/4/2024, 4/28/2025		IN THE LOAN'S FIRST YEAR THE FOUNDATION HAS RECEIVED REQUIRED FINANCIAL INFORMATION FROM THE ORGANIZATION. ALL REPORTS ARE AVAILABLE UPON REQUEST. THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
NationSwell	36 W 20th Street New York, NY 10011	2024-10-25	30,000	Support for sponsorship of the NationSwell Summit being held on November 21, 2024 in New York, NY	30,000	No	2025-07-14T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Indiana Youth Institute Inc	55 Monument Circle Suite 201 Indianapolis, IN 46204	2024-11-11	2,000	Support various KIDS COUNT activities	2,000	No	2025-01-30T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
Arizona Center for African American Resources	14850 N SCOTTSDALE RD Suite 485 Scottsdale, AZ 85254	2024-11-21	5,000	Support intergenerational Well-being Cohort Small-test-of-change	5,000	No	2025-02-26T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
BUILD Incorporated	5100 W Harrison St Chicago, IL 60644	2024-12-17	65,000	Support to scale Holding Space - Stick Talk hubs	0	No	n/a		n/a
Appalachian Community Capital Corporation	110 Peppers Ferry Road NW Christiansburg, VA 24073	2024-12-18	25,000	Support the regional Rural Investment Collaboration	25,000	No	2025-08-22T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.
ProgressNow Education	POB 664 Earlyville, VA 22936	2024-12-18	25,000	Support policy advocacy and strategic communications to advance juvenile justice reforms in Maryland	25,000	No	2025-07-21T00:00:00		THE FOUNDATION HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS PROVIDED FROM THE GRANTEE SO NO INDEPENDENT VERIFICATION OF THE REPORTS WERE REQUIRED OR MADE.

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Statement:

THE DISTRICT OF COLUMBIA DOES NOT REQUIRE NONPROFIT ORGANIZATIONS TO FILE A COPY OF THEIR FORM 990-PF WITH THE OFFICE OF TAX AND REVENUE.

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: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
CAPITAL GAIN / (LOSS) FOR BOOK PURPOSES					222,554,677	171,920,229			50,634,448	

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Identifier	Return Reference	Explanation
PAYMENT TO A GOVERNMENT OFFICIAL	Form 990-PF, Part VI, Section B Line 1a6	During tax year 2024, the Organization made payments to an individual for consulting services pursuant to a contractual arrangement. It was later discovered that the individual providing consulting services serves as a state judge, and therefore he is classified as a "government official" within the meaning of IRC Section 4946(c)(5). The payments made by the Foundation are not subject to excise tax under Reg. 53.4941(a)-1(a)(2) and Reg. 53.4941(a)-1(b) because the government official in question did not know that the payments constituted self-dealing. Upon discovering the existence of a self-dealing transaction, the Organization ceased making all payments to the government official. The Organization is not filing Form 4720 because Reg. 53.6011-1(b) states that an organization shall file Form 4720 for any act of self-dealing other than an act giving rise to no tax under IRC Section 4941(a)(1). In this instance, because the government official did not know that the payments constituted a self-dealing transaction, no excise tax is due, and therefore Form 4720 should not be filed.

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	89,936,450	83,191,716

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PUBLIC EQUITIES - US LARGE CAP	33,312,157	334,561,831
PUBLIC EQUITIES - US SMALL CAP	10,919,311	23,357,378
PUBLIC EQUITIES - FRGN DEV CTR	209,876,263	245,089,886

TY 2024 IRS 990 e-File Render

Name:	Annie E Casey Foundation Inc
EIN:	52-1951681
Software ID:	24020961
Software Version:	2024v5.1
US Government Securities - End of Year Book Value:	142,452,265
US Government Securities - End of Year Fair Market Value:	128,528,163
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc
EIN: 52-1951681
Software ID: 24020961
Software Version: 2024v5.1

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PARTNERSHIPS INVESTED IN US LARGE CAP	AT COST	206,416,947	298,018,706
PARTNERSHIPS INVESTED IN FOREIGN EMERGING MARKET PUBLIC EQUITIES	AT COST	90,000,000	88,687,753
PARTNERSHIPS INVESTED IN FOREIGN DEVELOP COUNTRIES PUBLIC EQUITIES	AT COST	55,069,332	79,069,282
PARTNERSHIPS INVESTED IN VENTURE PRIVATE SECURITIES	AT COST	498,400,031	917,214,207
PARTNERSHIPS INVESTED IN REAL ESTATE PRIVATE SECURITIES	AT COST	36,103,519	46,908,797
PARTNERSHIPS INVESTED IN BUYOUT PRIVATE SECURITIES	AT COST	174,007,034	231,758,176
PARTNERSHIPS INVESTED IN NATURAL RESOURCES PRIVATE SECURITIES	AT COST	54,656,295	62,432,978
PARTNERSHIPS INVESTED IN PRIVATE CREDIT SECURITIES	AT COST	29,745,970	29,945,762
PARTNERSHIPS INVESTED IN OPPORTUNISTIC PRIVATE SECURITIES	AT COST	14,753,837	20,285,913
LONG/SHORT HEDGE FUNDS	AT COST	163,172,390	283,259,981
LONG/SHORT GLOBAL HEDGE FUNDS	AT COST	0	0
OPPORTUNISTIC HEDGE FUNDS	AT COST	80,303,599	101,747,107
DIVERSIFIED ARBITRAGE HEDGE FUNDS	AT COST	21,987,090	68,717,184
TACTICAL TRADING HEDGE FUNDS	AT COST	28,250,599	39,045,442
DISTRESSED CREDIT HEDGE FUNDS	AT COST	19,400,646	29,506,687
SOCIAL INVESTMENTS	AT COST	24,866,667	30,637,285
SOCIAL INVESTMENT LOAN	AT COST	1,000,000	1,000,000

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
LAND	3,526,668	0	3,526,668	3,526,668
BUILDINGS AND IMPROVEMENTS	58,274,277	33,340,914	24,933,363	24,933,363
LEASEHOLD IMPROVEMENTS	577,673	260,032	317,641	317,641
FURNITURE AND FIXTURES	625,284	540,377	84,907	84,907
COMPUTER AND OFFICE EQUIPMENT	4,598,739	3,889,228	709,511	709,511

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	667,446	394,200		273,246

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc
EIN: 52-1951681
Software ID: 24020961
Software Version: 2024v5.1
Total Mortgage Amount: 40,530,626

Item No.	1
Lender's Name	COMPASS MORTGAGE CORPORATION
Lender's Title	
Relationship to Insider	
Original Amount of Loan	14,400,000
Balance Due	7,173,426
Date of Note	2017-06
Maturity Date	2032-06
Repayment Terms	ANNUAL PRIN PMNTS OF $967,200 UNTIL MATURITY
Interest Rate	4.72
Security Provided by Borrower	NONE
Purpose of Loan	FINANCE BUILDING RENOVATIONS
Description of Lender Consideration	
Consideration FMV	

Item No.	2
Lender's Name	AEMI FUND XVIII LLC NOTE A
Lender's Title	
Relationship to Insider	
Original Amount of Loan	4,474,550
Balance Due	0
Date of Note	2017-12
Maturity Date	2047-12
Repayment Terms	ANNUAL INT THRU 12/1/24; INT & PRIN 12/1/2025-2047
Interest Rate	1.0
Security Provided by Borrower	LOAN AGRMNT, DEED TO SECURE DEBT, SEC AGREMNT
Purpose of Loan	FOR CHARITABLE PURPOSE EXPENDITURES
Description of Lender Consideration	
Consideration FMV	

Item No.	3
Lender's Name	AEMI FUND XVIII LLC NOTE B
Lender's Title	
Relationship to Insider	
Original Amount of Loan	1,895,450
Balance Due	0
Date of Note	2017-12
Maturity Date	2047-12
Repayment Terms	ANNUAL INT THRU 12/1/24; PRIN 12/1/2025-2047
Interest Rate	1.0
Security Provided by Borrower	LOAN AGRMNT, DEED TO SECURE DEBT, SEC AGREMNT
Purpose of Loan	FOR CHARITABLE PURPOSE EXPENDITURES

Description of Lender Consideration	
Consideration FMV	

Item No.	4
Lender's Name	BROWNFIELD REVITALIZATION 50 LLC NOTE A
Lender's Title	
Relationship to Insider	
Original Amount of Loan	7,464,369
Balance Due	0
Date of Note	2017-12
Maturity Date	2047-12
Repayment Terms	ANNUAL INT THRU 12/1/24; INT & PRIN 12/1/2025-2047
Interest Rate	1.0
Security Provided by Borrower	LOAN AGRMNT, DEED TO SECURE DEBT, SEC AGREMNT
Purpose of Loan	FOR CHARITABLE PURPOSE EXPENDITURES
Description of Lender Consideration	
Consideration FMV	

Item No.	5
Lender's Name	BROWNFIELD REVITALIZATION 50 LLC NOTE B
Lender's Title	
Relationship to Insider	
Original Amount of Loan	2,825,631
Balance Due	0
Date of Note	2017-12
Maturity Date	2047-12
Repayment Terms	ANNUAL INT THRU 12/1/24; INT & PRIN 12/1/2025-2047
Interest Rate	1.0
Security Provided by Borrower	LOAN AGRMNT, DEED TO SECURE DEBT, SEC AGREMNT
Purpose of Loan	FOR CHARITABLE PURPOSE EXPENDITURES
Description of Lender Consideration	
Consideration FMV	

Item No.	6
Lender's Name	ENMP 73 LP NOTE A
Lender's Title	
Relationship to Insider	
Original Amount of Loan	5,948,031
Balance Due	0
Date of Note	2017-12
Maturity Date	2047-12
Repayment Terms	ANNUAL INT THRU 12/1/24; INT & PRIN 12/1/2025-2047
Interest Rate	1.0
Security Provided by Borrower	LOAN AGRMNT, DEED TO SECURE DEBT, SEC AGREMNT
Purpose of Loan	FOR CHARITABLE PURPOSE EXPENDITURES
Description of Lender Consideration	
Consideration FMV	

Item No.	7

Lender's Name	ENMP 73 LP NOTE B
Lender's Title	
Relationship to Insider	
Original Amount of Loan	2,781,969
Balance Due	0
Date of Note	2017-12
Maturity Date	2047-12
Repayment Terms	ANNUAL INT THRU 12/1/24; INT & PRIN 12/1/2025-2047
Interest Rate	1.0
Security Provided by Borrower	LOAN AGRMNT, DEED TO SECURE DEBT, SEC AGREMNT
Purpose of Loan	FOR CHARITABLE PURPOSE EXPENDITURES
Description of Lender Consideration	
Consideration FMV	

Item No.	8
Lender's Name	NORTHERN TRUST COMPANY NOTE A
Lender's Title	
Relationship to Insider	
Original Amount of Loan	4,000,000
Balance Due	4,000,000
Date of Note	2018-07
Maturity Date	2025-06
Repayment Terms	INT COMP ANNUALLY, DUE SEMI-ANNUALLY; PRIN DUE ON MAT
Interest Rate	5.16
Security Provided by Borrower	NONE
Purpose of Loan	FINANCE UA ASSOCIATES' DEVELOPMENT IN ATLANTA
Description of Lender Consideration	
Consideration FMV	

Item No.	9
Lender's Name	NORTHERN TRUST COMPANY NOTE B
Lender's Title	
Relationship to Insider	
Original Amount of Loan	3,000,000
Balance Due	3,000,000
Date of Note	2018-07
Maturity Date	2025-06
Repayment Terms	INT COMP ANNUALLY, DUE SEMI-ANNUALLY; PRIN DUE ON MAT
Interest Rate	0.5
Security Provided by Borrower	NONE
Purpose of Loan	FINANCE UA ASSOCIATES' DEVELOPMENT IN ATLANTA
Description of Lender Consideration	
Consideration FMV	

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
PROGRAM RELATED INVESTMENTS	49,765,325	58,412,034	49,547,761
AECF ATLANTA REALTY	780,400	780,399	780,399
INVESTMENT IN LEVERAGE LENDER I	9,500	0	0
DEPOSITS	273,551	402,944	285,190
SECURITY SALES RECEIVABLE	6,544,961	66,487,055	66,485,163
RIGHT-OF-USE ASSET	0	0	1,029,444
OTHER	37,540	83,856	31,041,237

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	16,837	4,783		12,054
DIRECT CHARITABLE EXPENSES	19,173,659			19,173,659
IT - MAINTENANCE & SUPPORT	2,190,199	109,910		2,080,289
IT - PARTS & SUPPLIES	416,928			416,928
LIABILITY INSURANCE	347,002	35,934		311,068
MISSION-RELATED EXPENSES	23,137			23,137
OFFICE SUPPLIES	87,943	8,544		79,399
POSTAGE & SHIPPING	31,315	7,701		23,614
SECURITY EXPENSES	257,516	257,516		0
SMALL OFFICE EQUIPMENT	215,504			215,504
WATERFALL GARDEN PARK MAINTENANCE	302,526			302,526
MISCELLANEOUS	412,027	117,411		294,616
FEDERAL EXCISE TAXES & STATE UBI TAXES	-1,240,102			

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
HEDGE FUND AND OTHER ALTERNATIVE INVESTMENT INCOME	64,451,744	77,816,302	
PRIOR YEAR GRANTS & DCA RECOVERIES	200,537		
GAIN ON NMTC	7,503,050		

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Description	Amount
NET ASSET TRANSFER FROM DISSOLUTION OF CONTROLLED ENTITY	146,944

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Description	Beginning of Year - Book Value	End of Year - Book Value
INVESTMENT PAYABLES	7,508,348	5,601,428

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT & CUSTODY FEES	9,703,830	6,218,967		3,484,863
CONSULTING - ADMINISTRATIVE	3,001,187			3,001,187
CONSULTING - PROGRAM RELATED	8,925			8,925
EMPLOYMENT SEARCH FEES	12,872			12,872
MEMBERSHIP FEES	30,462			30,462

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES FROM PARTNERSHIPS		828,684		

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Name	US / Foreign Address	EIN	Description	Amount
AACP CHINA VENTURE INVESTORS L LP	ONE EMBARCADERO 16TH FLOOR SAN FRANCISCO, CA 94111	98-1582401	N/A	0
AACP CHINA GROWTH INVESTORS VII LP	ONE EMBARCADERO CENTER 16TH FLOOR SAN FRANCISCO, CA 94111	32-0498865	N/A	0
AECF - ECLF LEVERAGE LENDER I LLC	701 ST PAUL STREET BALTIMORE, MD 21202	82-3687925	CAPITAL DISTRIBUTION	146,944
Total				

TY 2024 IRS 990 e-File Render

Name: Annie E Casey Foundation Inc

EIN: 52-1951681

Software ID: 24020961

Software Version: 2024v5.1

Name	US / Foreign Address	EIN	Description	Amount
AACP SPECIAL SITUATIONS I LP	ONE EMBARCADERO 16TH FLOOR SAN FRANCISCO, CA 94111	37-1862929	CAPITAL CONTRIBUTION	105,165
Total				