

Return of Organization Exempt From Income Tax

Form 990

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

2023

Department of the Treasury Internal Revenue Service

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

Go to www.irs.gov/Form990 for instructions and the latest information.

Open to Public Inspection

A For the 2023 calendar year, or tax year beginning JUL 1, 2023 and ending JUN 30, 2024

B Check if applicable: C Name of organization: CATHOLIC SCHOOLS FOUNDATION, INC. D Employer identification number: 22-2485502 E Telephone number: 617-778-5981 G Gross receipts \$: 40,168,448. H(a) Is this a group return for subordinates? H(b) Are all subordinates included? I Tax-exempt status: J Website: CSFBOSTON.ORG K Form of organization: L Year of formation: 1983 M State of legal domicile: MA

Part I Summary

Table with 3 columns: Description, Prior Year, Current Year. Rows include: 1-7a Activities & Governance, 8-12 Revenue, 13-19 Expenses, 20-22 Net Assets or Fund Balances.

Part II Signature Block

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.

Sign Here: Signature of officer THOMAS CORRA, TREASURER. Date. Paid Preparer Use Only: Print/Type preparer's name CAITLIN LIMOGES, CPA. Preparer's signature CAITLIN LIMOGES, CPA. Date 02/17/25. PTIN P01633588. Firm's name AAFCPAS, INC. Firm's EIN 04-2571780. Firm's address 50 WASHINGTON STREET WESTBOROUGH, MA 01581. Phone no. 508-366-9100.

May the IRS discuss this return with the preparer shown above? See instructions. [X] Yes [ ] No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission: THE CATHOLIC SCHOOLS FOUNDATION CHANGES LIVES BY PROVIDING FAMILIES WITH DEMONSTRATED FINANCIAL NEED AN OPPORTUNITY TO GIVE THIER SONS AND DAUGHTERS A QUALITY EDUCATION, FOCUSED ON CHRISTIAN VALUES AND CHARACTER FORMATION AT CATHOLIC SCHOOLS LOCATED THROUGHOUT THE

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 15,899,391. including grants of \$ 15,312,837. ) (Revenue \$ ) 3,784 SCHOLARSHIPS AWARDED TO STUDENTS TO ATTEND CATHOLIC SCHOOLS WITHIN THE ARCHDIOCESE OF BOSTON AS WELL AS FOR PROGRAMS TO SUPPORT SCHOLARSHIP RECIPIENTS.

4b (Code: ) (Expenses \$ 2,228,851. including grants of \$ 2,182,945. ) (Revenue \$ ) NON-SCHOLARSHIP PROGRAM GRANTS TO SUPPORT SCHOOL GROWTH AND SUSTAINABILITY, INCLUDING INITIATIVES FOR MARKETING, TECHNOLOGY, LEADERSHIP, COUNSELING, COLLEGE READINESS, REGIONAL PARTNERSHIPS AND ENRICHMENT.

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 18,128,242.

Part IV Checklist of Required Schedules

Table with 3 columns: Question ID, Yes, No. Rows include questions 1 through 21 regarding organizational requirements, such as political campaign activities, lobbying, and financial reporting.

**Part IV Checklist of Required Schedules** (continued)

|   | Yes | No |
|---|-----|----|
| <b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> .....  |     | X  |
| <b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> .....  | X   |    |
| <b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> .....  |     | X  |
| <b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....  |     |    |
| <b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....   |     |    |
| <b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....  |     |    |
| <b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....  |     | X  |
| <b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> .....   |     | X  |
| <b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i> .....   |     | X  |
| <b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> ..... |     | X  |
| <b>28</b> Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):   |     |    |
| <b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i> .....  |     | X  |
| <b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i> .....   |     | X  |
| <b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i> .....  |     | X  |
| <b>29</b> Did the organization receive more than \$25,000 in noncash contributions? <i>If "Yes," complete Schedule M</i> .....  | X   |    |
| <b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....   |     | X  |
| <b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....   |     | X  |
| <b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....   |     | X  |
| <b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....   |     | X  |
| <b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....   | X   |    |
| <b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....  |     | X  |
| <b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....   |     |    |
| <b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....   |     | X  |
| <b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> .....  |     | X  |
| <b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? .....  | X   |    |

**Note:** All Form 990 filers are required to complete Schedule O

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

Check if Schedule O contains a response or note to any line in this Part V

|   | Yes | No |
|---|-----|----|
| <b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable .....  |     |    |
| <b>b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable .....  |     |    |
| <b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? ..... | X   |    |

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

Table with 3 columns: Question/Description, Yes, No. Rows include questions 2a through 17 regarding employee counts, tax returns, unrelated business income, foreign accounts, prohibited transactions, and charitable contributions.

**Part VI Governance, Management, and Disclosure.** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

**Section A. Governing Body and Management**

|           |  | Yes | No |
|-----------|--|-----|----|
| <b>1a</b> | Enter the number of voting members of the governing body at the end of the tax year<br>If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O. |     |    |
|           | 1a 35  |     |    |
| <b>b</b>  | Enter the number of voting members included on line 1a, above, who are independent   |     |    |
|           | 1b 35  |     |    |
| <b>2</b>  | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?  | X   |    |
| <b>3</b>  | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?  |     | X  |
| <b>4</b>  | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?   |     | X  |
| <b>5</b>  | Did the organization become aware during the year of a significant diversion of the organization's assets?   |     | X  |
| <b>6</b>  | Did the organization have members or stockholders?   | X   |    |
| <b>7a</b> | Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?   | X   |    |
| <b>b</b>  | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?  | X   |    |
| <b>8</b>  | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:  |     |    |
| <b>a</b>  | The governing body?  | X   |    |
| <b>b</b>  | Each committee with authority to act on behalf of the governing body?  | X   |    |
| <b>9</b>  | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O   |     | X  |

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

|            |  | Yes | No |
|------------|--|-----|----|
| <b>10a</b> | Did the organization have local chapters, branches, or affiliates?   |     | X  |
| <b>b</b>   | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?   |     |    |
| <b>10b</b> |  |     |    |
| <b>11a</b> | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?  |     | X  |
| <b>b</b>   | Describe on Schedule O the process, if any, used by the organization to review this Form 990.  |     |    |
| <b>12a</b> | Did the organization have a written conflict of interest policy? If "No," go to line 13  | X   |    |
| <b>b</b>   | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?  | X   |    |
| <b>c</b>   | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done   | X   |    |
| <b>12c</b> |  |     |    |
| <b>13</b>  | Did the organization have a written whistleblower policy?  | X   |    |
| <b>14</b>  | Did the organization have a written document retention and destruction policy?   | X   |    |
| <b>15</b>  | Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?   |     |    |
| <b>a</b>   | The organization's CEO, Executive Director, or top management official   | X   |    |
| <b>b</b>   | Other officers or key employees of the organization  |     | X  |
|            | If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.   |     |    |
| <b>16a</b> | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?  |     | X  |
| <b>b</b>   | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? |     |    |
| <b>16b</b> |  |     |    |

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed MA
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website     Another's website     Upon request     Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records  
**MICHAEL REARDON - 617-778-5981**  
**67 BATTERYMARCH STREET, 6TH FL, BOSTON, MA 02110**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
  - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
  - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
  - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

| (A)<br>Name and title                                 | (B)<br>Average hours per week (list any hours for related organizations below line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |          | (D)<br>Reportable compensation from the organization (W-2/1099-MISC/1099-NEC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|---|---|---|-----------------------|---------|--------------|------------------------------|----------|---|--|---|
|   |   | Individual trustee or director  | Institutional trustee | Officer | Key employee | Highest compensated employee | Former   |   |  |   |
| (1) MICHAEL REARDON<br>EXECUTIVE DIRECTOR             | 35.00   |   |                       | X       |              |                              | 281,241. | 0.  | 37,004.  |   |
| (2) MEGAN ADZIMA<br>ALLOCATIONS AND PARTNERSHIPS DIR. | 35.00   |   |                       |         | X            |                              | 142,913. | 0.  | 8,717.   |   |
| (3) GINA RINDFLEISCH<br>DIRECTOR OF DEVELOPMENT       | 35.00   |   |                       |         | X            |                              | 131,149. | 0.  | 7,962.   |   |
| (4) CARDINAL SEAN O'MALLEY<br>CHAIRMAN                | 0.10  | X   |                       | X       |              |                              | 0.       | 0.  | 0.   |   |
| (5) MICHAEL ROGERS<br>PRESIDENT                       | 8.00  | X   |                       | X       |              |                              | 0.       | 0.  | 0.   |   |
| (6) THOMAS CORRA<br>TREASURER                         | 3.00  | X   |                       | X       |              |                              | 0.       | 0.  | 0.   |   |
| (7) CHRISTINE KOMOLA<br>VICE PRESIDENT                | 3.00  | X   |                       | X       |              |                              | 0.       | 0.  | 0.   |   |
| (8) CHRISTOPHER REMONDI<br>CLERK                      | 3.00  | X   |                       | X       |              |                              | 0.       | 0.  | 0.   |   |
| (9) MARGARET WADE<br>SENIOR VICE PRESIDENT            | 3.00  | X   |                       | X       |              |                              | 0.       | 0.  | 0.   |   |
| (10) PETER LYNCH<br>PRESIDENT EMERITUS                | 4.00  | X   |                       |         |              |                              | 0.       | 0.  | 0.   |   |
| (11) PAUL BIRMINGHAM<br>LIFE TRUSTEE                  | 2.00  | X   |                       |         |              |                              | 0.       | 0.  | 0.   |   |
| (12) FR. MARC BISHOP<br>TRUSTEE                       | 2.00  | X   |                       |         |              |                              | 0.       | 0.  | 0.   |   |
| (13) RYAN CONNOLLY<br>TRUSTEE                         | 2.00  | X   |                       |         |              |                              | 0.       | 0.  | 0.   |   |
| (14) WILLIAM MOSAKOWSKI<br>TRUSTEE                    | 2.00  | X   |                       |         |              |                              | 0.       | 0.  | 0.   |   |
| (15) NOEL DIXON<br>TRUSTEE                            | 2.00  | X   |                       |         |              |                              | 0.       | 0.  | 0.   |   |
| (16) KATE FERRARA<br>TRUSTEE                          | 2.00  | X   |                       |         |              |                              | 0.       | 0.  | 0.   |   |
| (17) BRIAN GALLAGHER<br>TRUSTEE                       | 2.00  | X   |                       |         |              |                              | 0.       | 0.  | 0.   |   |

**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

| (A)<br>Name and title  | (B)<br>Average hours per week (list any hours for related organizations below line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC/1099-NEC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|--|---|---|-----------------------|---------|--------------|------------------------------|--------|---|--|---|
|  |   | Individual trustee or director  | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |   |  |   |
| (18) ROGER JOSEPH TRUSTEE                                      | 2.00  | X   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (19) GARY KANEB TRUSTEE  | 2.00  | X   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (20) RENEE MINOGUE TRUSTEE                                     | 2.00  | X   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (21) ROBERT MORRISSEY TRUSTEE                                  | 2.00  | X   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (22) KEVIN O'LEARY TRUSTEE                                     | 2.00  | X   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (23) JOHN REGAN TRUSTEE  | 2.00  | X   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (24) TCHINTCIA BARROS TRUSTEE                                  | 2.00  | X   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (25) JOHN REMONDI LIFE TRUSTEE                                 | 2.00  | X   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (26) MARGARET REYNOLDS, CFA TRUSTEE                            | 2.00  | X   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| <b>1b Subtotal</b>   |   |   |                       |         |              |                              |        | 555,303.  | 0.   | 53,683.   |
| <b>c Total from continuation sheets to Part VII, Section A</b> |   |   |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| <b>d Total (add lines 1b and 1c)</b>                           |   |   |                       |         |              |                              |        | 555,303.  | 0.   | 53,683.   |

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 3

|  | Yes | No |
|--|-----|----|
| <b>3</b> Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>  |     | X  |
| <b>4</b> For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i> | X   |    |
| <b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>                       |     | X  |

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

| (A)<br>Name and business address | (B)<br>Description of services | (C)<br>Compensation |
|----------------------------------|--------------------------------|---------------------|
| NONE                             |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 0

SEE PART VII, SECTION A CONTINUATION SHEETS



**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

| (A)<br>Name and title                    | (B)<br>Average hours per week (list any hours for related organizations below line) | (C)<br>Position (check all that apply) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|--|---|--|-----------------------|---------|--------------|------------------------------|--------|--|---|---|
|  |   | Individual trustee or director         | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |  |   |   |
| (27) MICHAEL SUTPHIN<br>TRUSTEE          | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (28) TIMOTHY TULLY<br>TRUSTEE            | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (29) SEAN JUDGE<br>TRUSTEE               | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (30) SHELAGH MAHONEY<br>TRUSTEE          | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (31) CINDY WICKWIRE<br>TRUSTEE           | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (32) ELLYN CHARTERS ZARRACINA<br>TRUSTEE | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (33) KEVIN O'TOOLE<br>TRUSTEE            | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (34) SARAH JANKOWSKI<br>TRUSTEE          | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (35) SUJEY MORGAN<br>TRUSTEE             | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (36) FR. BRYAN PARRISH<br>TRUSTEE        | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (37) JEN KORDELL<br>TRUSTEE              | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (38) KARA BRENNAN<br>TRUSTEE             | 2.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
|  |   |  |                       |         |              |                              |        |  |   |   |
| Total to Part VII, Section A, line 1c    |   |  |                       |         |              |                              |        |  |   |   |

**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

|  |   |  | (A)                  | (B)                                | (C)                        | (D)  |  |
|--|---|--|----------------------|------------------------------------|----------------------------|--|--|
|  |   |  | Total revenue        | Related or exempt function revenue | Unrelated business revenue | Revenue excluded from tax under sections 512 - 514 |  |
| Contributions, Gifts, Grants and Other Similar Amounts | <b>1 a</b>  | Federated campaigns .....  | <b>1a</b>            |                                    |                            |  |  |
|  | <b>b</b>  | Membership dues .....  | <b>1b</b>            |                                    |                            |  |  |
|  | <b>c</b>  | Fundraising events .....   | <b>1c</b>            | 4,763,226.                         |                            |  |  |
|  | <b>d</b>  | Related organizations .....  | <b>1d</b>            |                                    |                            |  |  |
|  | <b>e</b>  | Government grants (contributions) .....  | <b>1e</b>            |                                    |                            |  |  |
|  | <b>f</b>  | All other contributions, gifts, grants, and similar amounts not included above ... | <b>1f</b>            | 10,442,263.                        |                            |  |  |
|  | <b>g</b>  | Noncash contributions included in lines 1a-1f                                      | <b>1g</b>            | \$ 223,263.                        |                            |  |  |
|  | <b>h</b>  | <b>Total.</b> Add lines 1a-1f .....  |                      | 15,205,489.                        |                            |  |  |
| Program Service Revenue                                | <b>2 a</b>  | _____  | <b>Business Code</b> |                                    |                            |  |  |
|  | <b>b</b>  | _____  |                      |                                    |                            |  |  |
|  | <b>c</b>  | _____  |                      |                                    |                            |  |  |
|  | <b>d</b>  | _____  |                      |                                    |                            |  |  |
|  | <b>e</b>  | _____  |                      |                                    |                            |  |  |
|  | <b>f</b>  | All other program service revenue .....  |                      |                                    |                            |  |  |
|  | <b>g</b>  | <b>Total.</b> Add lines 2a-2f .....  |                      |                                    |                            |  |  |
| Other Revenue  | <b>3</b>  | Investment income (including dividends, interest, and other similar amounts) ..... |                      | 2,511,915.                         |                            | 2511915.   |  |
|  | <b>4</b>  | Income from investment of tax-exempt bond proceeds .....                           |                      |                                    |                            |  |  |
|  | <b>5</b>  | Royalties .....  |                      |                                    |                            |  |  |
|  | <b>6 a</b>  | Gross rents .....  | <b>6a</b>            | (i) Real                           |                            |  |  |
|  |   |  |                      | (ii) Personal                      |                            |  |  |
|  |   |  |                      |                                    |                            |  |  |
|  | <b>b</b>  | Less: rental expenses ...  | <b>6b</b>            |                                    |                            |  |  |
|  | <b>c</b>  | Rental income or (loss)  | <b>6c</b>            |                                    |                            |  |  |
|  | <b>d</b>  | Net rental income or (loss) .....  |                      |                                    |                            |  |  |
|  | <b>7 a</b>  | Gross amount from sales of assets other than inventory .....                       | <b>7a</b>            | (i) Securities                     |                            |  |  |
|  |   |  |                      | (ii) Other                         |                            |  |  |
|  |   |  |                      |                                    |                            |  |  |
|  | <b>b</b>  | Less: cost or other basis and sales expenses .....                                 | <b>7b</b>            | 21,716,711.                        |                            |  |  |
|  | <b>c</b>  | Gain or (loss) .....   | <b>7c</b>            | 701,858.                           |                            |  |  |
| <b>d</b>   | Net gain or (loss) .....  |  | 701,858.             |                                    | 701,858.                   |  |  |
| <b>8 a</b>   | Gross income from fundraising events (not including \$ 4,763,226. of contributions reported on line 1c). See Part IV, line 18 ..... | <b>8a</b>  |                      |                                    |                            |  |  |
|  |   |  | 32,475.              |                                    |                            |  |  |
| <b>b</b>   | Less: direct expenses .....   | <b>8b</b>  | 372,416.             |                                    |                            |  |  |
| <b>c</b>   | Net income or (loss) from fundraising events .....  |  | -339,941.            |                                    | -339,941.                  |  |  |
| <b>9 a</b>   | Gross income from gaming activities. See Part IV, line 19 .....   | <b>9a</b>  |                      |                                    |                            |  |  |
|  |   |  |                      |                                    |                            |  |  |
| <b>b</b>   | Less: direct expenses .....   | <b>9b</b>  |                      |                                    |                            |  |  |
| <b>c</b>   | Net income or (loss) from gaming activities .....   |  |                      |                                    |                            |  |  |
| <b>10 a</b>  | Gross sales of inventory, less returns and allowances .....   | <b>10a</b>   |                      |                                    |                            |  |  |
|  |   |  |                      |                                    |                            |  |  |
|  |   |  |                      |                                    |                            |  |  |
| <b>b</b>   | Less: cost of goods sold .....  | <b>10b</b>   |                      |                                    |                            |  |  |
| <b>c</b>   | Net income or (loss) from sales of inventory .....  |  |                      |                                    |                            |  |  |
| Miscellaneous Revenue                                  | <b>11 a</b>   | _____  | <b>Business Code</b> |                                    |                            |  |  |
|  | <b>b</b>  | _____  |                      |                                    |                            |  |  |
|  | <b>c</b>  | _____  |                      |                                    |                            |  |  |
|  | <b>d</b>  | All other revenue .....  |                      |                                    |                            |  |  |
|  | <b>e</b>  | <b>Total.</b> Add lines 11a-11d .....  |                      |                                    |                            |  |  |
| <b>12</b>  | <b>Total revenue.</b> See instructions .....  |  | 18,079,321.          | 0.                                 | 0.                         | 2873832.   |  |

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.   | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|--|-----------------------|---------------------------------|--|-----------------------------|
| <b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21  | 17,495,782.           | 17,495,782.                     |  |                             |
| <b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22   |                       |                                 |  |                             |
| <b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16  |                       |                                 |  |                             |
| <b>4</b> Benefits paid to or for members   |                       |                                 |  |                             |
| <b>5</b> Compensation of current officers, directors, trustees, and key employees  | 336,658.              | 134,664.                        | 67,330.                                | 134,664.                    |
| <b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)  |                       |                                 |  |                             |
| <b>7</b> Other salaries and wages  | 756,644.              | 319,229.                        | 144,219.                               | 293,196.                    |
| <b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)  | 14,963.               | 5,937.                          | 1,689.                                 | 7,337.                      |
| <b>9</b> Other employee benefits   | 72,181.               | 28,730.                         | 10,598.                                | 32,853.                     |
| <b>10</b> Payroll taxes  | 70,495.               | 28,090.                         | 11,179.                                | 31,226.                     |
| <b>11</b> Fees for services (nonemployees):  |                       |                                 |  |                             |
| <b>a</b> Management  |                       |                                 |  |                             |
| <b>b</b> Legal   | 5,430.                |                                 | 5,430.                                 |                             |
| <b>c</b> Accounting  | 93,738.               |                                 | 93,738.                                |                             |
| <b>d</b> Lobbying  |                       |                                 |  |                             |
| <b>e</b> Professional fundraising services. See Part IV, line 17   |                       |                                 |  |                             |
| <b>f</b> Investment management fees  |                       |                                 |  |                             |
| <b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)  | 39,000.               |                                 | 23,700.                                | 15,300.                     |
| <b>12</b> Advertising and promotion  | 48,509.               | 9,271.                          | 6,555.                                 | 32,683.                     |
| <b>13</b> Office expenses  | 119,729.              | 9,743.                          | 12,804.                                | 97,182.                     |
| <b>14</b> Information technology   | 35,960.               | 10,700.                         | 8,965.                                 | 16,295.                     |
| <b>15</b> Royalties  |                       |                                 |  |                             |
| <b>16</b> Occupancy  | 162,149.              | 64,881.                         | 13,043.                                | 84,225.                     |
| <b>17</b> Travel   | 11,900.               | 1,883.                          | 4,358.                                 | 5,659.                      |
| <b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials   |                       |                                 |  |                             |
| <b>19</b> Conferences, conventions, and meetings   |                       |                                 |  |                             |
| <b>20</b> Interest   |                       |                                 |  |                             |
| <b>21</b> Payments to affiliates   |                       |                                 |  |                             |
| <b>22</b> Depreciation, depletion, and amortization  | 4,029.                |                                 | 4,029.                                 |                             |
| <b>23</b> Insurance  |                       |                                 |  |                             |
| <b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)                                    |                       |                                 |  |                             |
| <b>a</b> MISCELLANEOUS   | 62,309.               | 1,036.                          | 53,795.                                | 7,478.                      |
| <b>b</b> EVENT EXPENSE   | 18,296.               | 18,296.                         |  |                             |
| <b>c</b> DUES AND SUBSCRIPTIONS  | 8,201.                |                                 | 1,104.                                 | 7,097.                      |
| <b>d</b>   |                       |                                 |  |                             |
| <b>e</b> All other expenses  |                       |                                 |  |                             |
| <b>25</b> Total functional expenses. Add lines 1 through 24e   | 19,355,973.           | 18,128,242.                     | 462,536.                               | 765,195.                    |
| <b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) |                       |                                 |  |                             |

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X

|   |  | (A)<br>Beginning of year |              | (B)<br>End of year |
|---|--|--------------------------|--------------|--------------------|
| <b>Assets</b>   | <b>1</b> Cash - non-interest-bearing .....   | 42,664.                  | <b>1</b>     | 31,948.            |
|   | <b>2</b> Savings and temporary cash investments .....  | 3,259,349.               | <b>2</b>     | 4,859,290.         |
|   | <b>3</b> Pledges and grants receivable, net .....  | 2,378,033.               | <b>3</b>     | 1,637,495.         |
|   | <b>4</b> Accounts receivable, net .....  |                          | <b>4</b>     |                    |
|   | <b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons ..... |                          | <b>5</b>     |                    |
|   | <b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....   |                          | <b>6</b>     |                    |
|   | <b>7</b> Notes and loans receivable, net .....   |                          | <b>7</b>     |                    |
|   | <b>8</b> Inventories for sale or use .....   |                          | <b>8</b>     |                    |
|   | <b>9</b> Prepaid expenses and deferred charges .....   | 56,264.                  | <b>9</b>     | 40,473.            |
|   | <b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....   | <b>10a</b> 133,794.      |              |                    |
|   | <b>b</b> Less: accumulated depreciation .....  | <b>10b</b> 129,095.      | <b>10c</b>   | 4,699.             |
|   | <b>11</b> Investments - publicly traded securities .....   | 120,614,932.             | <b>11</b>    | 131,399,787.       |
|   | <b>12</b> Investments - other securities. See Part IV, line 11 .....   | 3,169,704.               | <b>12</b>    | 3,433,538.         |
|   | <b>13</b> Investments - program-related. See Part IV, line 11 .....  |                          | <b>13</b>    |                    |
|   | <b>14</b> Intangible assets .....  |                          | <b>14</b>    |                    |
|   | <b>15</b> Other assets. See Part IV, line 11 .....   | 250,219.                 | <b>15</b>    | 138,943.           |
| <b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33) ..... | 129,779,893.   | <b>16</b>                | 141,546,173. |                    |
| <b>Liabilities</b>  | <b>17</b> Accounts payable and accrued expenses .....  | 72,953.                  | <b>17</b>    | 82,570.            |
|   | <b>18</b> Grants payable .....   | 16,064,159.              | <b>18</b>    | 17,246,794.        |
|   | <b>19</b> Deferred revenue .....   |                          | <b>19</b>    |                    |
|   | <b>20</b> Tax-exempt bond liabilities .....  |                          | <b>20</b>    |                    |
|   | <b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....  |                          | <b>21</b>    |                    |
|   | <b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....     |                          | <b>22</b>    |                    |
|   | <b>23</b> Secured mortgages and notes payable to unrelated third parties .....   |                          | <b>23</b>    |                    |
|   | <b>24</b> Unsecured notes and loans payable to unrelated third parties .....   |                          | <b>24</b>    |                    |
|   | <b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....  | 276,967.                 | <b>25</b>    | 155,098.           |
|   | <b>26 Total liabilities.</b> Add lines 17 through 25 .....   | 16,414,079.              | <b>26</b>    | 17,484,462.        |
| <b>Net Assets or Fund Balances</b>  | <b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>  |                          |              |                    |
|   | <b>27</b> Net assets without donor restrictions .....  | 39,517,689.              | <b>27</b>    | 43,941,984.        |
|   | <b>28</b> Net assets with donor restrictions .....   | 73,848,125.              | <b>28</b>    | 80,119,727.        |
|   | <b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>   |                          |              |                    |
|   | <b>29</b> Capital stock or trust principal, or current funds .....   |                          | <b>29</b>    |                    |
|   | <b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....   |                          | <b>30</b>    |                    |
|   | <b>31</b> Retained earnings, endowment, accumulated income, or other funds .....   |                          | <b>31</b>    |                    |
|   | <b>32</b> Total net assets or fund balances .....  | 113,365,814.             | <b>32</b>    | 124,061,711.       |
| <b>33</b> Total liabilities and net assets/fund balances .....            | 129,779,893.   | <b>33</b>                | 141,546,173. |                    |

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

|    |  |    |              |
|----|--|----|--------------|
| 1  | Total revenue (must equal Part VIII, column (A), line 12)  | 1  | 18,079,321.  |
| 2  | Total expenses (must equal Part IX, column (A), line 25)   | 2  | 19,355,973.  |
| 3  | Revenue less expenses. Subtract line 2 from line 1   | 3  | -1,276,652.  |
| 4  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                      | 4  | 113,365,814. |
| 5  | Net unrealized gains (losses) on investments   | 5  | 11,584,245.  |
| 6  | Donated services and use of facilities   | 6  |              |
| 7  | Investment expenses  | 7  |              |
| 8  | Prior period adjustments   | 8  |              |
| 9  | Other changes in net assets or fund balances (explain on Schedule O)   | 9  | 388,304.     |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B)) | 10 | 124,061,711. |

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

|   |  | Yes | No |
|---|--|-----|----|
| 1   | Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other   |     |    |
| If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.   |  |     |    |
| 2a  | Were the organization's financial statements compiled or reviewed by an independent accountant?  |     | X  |
| If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: |  |     |    |
| <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis                 |  |     |    |
| 2b  | Were the organization's financial statements audited by an independent accountant?   | X   |    |
| If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:              |  |     |    |
| <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis      |  |     |    |
| 2c  | If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? | X   |    |
| If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.   |  |     |    |
| 3a  | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?  |     | X  |
| 3b  | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits     |     |    |

Form 990 (2023)

**SCHEDULE A**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

Open to Public Inspection

|  |   |
|--|---|
| <b>Name of the organization</b><br>CATHOLIC SCHOOLS FOUNDATION, INC. | <b>Employer identification number</b><br>22-2485502 |
|--|---|

**Part I Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2  A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9  An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations .....
- g Provide the following information about the supported organization(s).

| (i) Name of supported organization | (ii) EIN | (iii) Type of organization (described on lines 1-10 above (see instructions)) | (iv) Is the organization listed in your governing document? |    | (v) Amount of monetary support (see instructions) | (vi) Amount of other support (see instructions) |
|------------------------------------|----------|---|---|----|---|---|
|                                    |          |   | Yes   | No |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
| <b>Total</b>                       |          |   |   |    |   |   |

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in)  | (a) 2019 | (b) 2020 | (c) 2021 | (d) 2022 | (e) 2023 | (f) Total |
|--|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....  |          |          |          |          |          |           |
| <b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....   |          |          |          |          |          |           |
| <b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....   |          |          |          |          |          |           |
| <b>4 Total.</b> Add lines 1 through 3 .....  |          |          |          |          |          |           |
| <b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) ..... |          |          |          |          |          |           |
| <b>6 Public support.</b> Subtract line 5 from line 4.  |          |          |          |          |          |           |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in)   | (a) 2019 | (b) 2020 | (c) 2021 | (d) 2022 | (e) 2023 | (f) Total                |
|---|----------|----------|----------|----------|----------|--------------------------|
| <b>7</b> Amounts from line 4 .....  |          |          |          |          |          |                          |
| <b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....  |          |          |          |          |          |                          |
| <b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....   |          |          |          |          |          |                          |
| <b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....   |          |          |          |          |          |                          |
| <b>11 Total support.</b> Add lines 7 through 10   |          |          |          |          |          |                          |
| <b>12</b> Gross receipts from related activities, etc. (see instructions) .....   |          |          |          |          | 12       |                          |
| <b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> ..... |          |          |          |          |          | <input type="checkbox"/> |

**Section C. Computation of Public Support Percentage**

|   |    |                          |
|---|----|--------------------------|
| <b>14</b> Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f)) .....   | 14 | %                        |
| <b>15</b> Public support percentage from 2022 Schedule A, Part II, line 14 .....  | 15 | %                        |
| <b>16a 33 1/3% support test - 2023.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....  |    | <input type="checkbox"/> |
| <b>b 33 1/3% support test - 2022.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....   |    | <input type="checkbox"/> |
| <b>17a 10% -facts-and-circumstances test - 2023.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....    |    | <input type="checkbox"/> |
| <b>b 10% -facts-and-circumstances test - 2022.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ..... |    | <input type="checkbox"/> |
| <b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....  |    | <input type="checkbox"/> |

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in)   | (a) 2019  | (b) 2020  | (c) 2021  | (d) 2022  | (e) 2023  | (f) Total |
|---|-----------|-----------|-----------|-----------|-----------|-----------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")   | 12873275. | 14086140. | 14658792. | 26355230. | 15205489. | 83178926. |
| <b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose | 50,904.   |           |           |           |           | 50,904.   |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513   |           |           |           |           |           |           |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf  |           |           |           |           |           |           |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge  |           |           |           |           |           |           |
| <b>6 Total.</b> Add lines 1 through 5   | 12924179. | 14086140. | 14658792. | 26355230. | 15205489. | 83229830. |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons  | 2970028.  | 3695401.  | 3302969.  | 2568000.  | 2968050.  | 15504448. |
| <b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year           |           |           |           |           |           | 0.        |
| <b>c</b> Add lines 7a and 7b  | 2970028.  | 3695401.  | 3302969.  | 2568000.  | 2968050.  | 15504448. |
| <b>8 Public support.</b> (Subtract line 7c from line 6.)  |           |           |           |           |           | 67725382. |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in)  | (a) 2019  | (b) 2020  | (c) 2021  | (d) 2022  | (e) 2023  | (f) Total |
|--|-----------|-----------|-----------|-----------|-----------|-----------|
| <b>9</b> Amounts from line 6   | 12924179. | 14086140. | 14658792. | 26355230. | 15205489. | 83229830. |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources | 1698481.  | 1404342.  | 1351364.  | 2050607.  | 2511915.  | 9016709.  |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975                           |           |           |           |           |           |           |
| <b>c</b> Add lines 10a and 10b   | 1698481.  | 1404342.  | 1351364.  | 2050607.  | 2511915.  | 9016709.  |
| <b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on      |           |           |           |           |           |           |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)                                  |           |           |           |           |           |           |
| <b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)   | 14622660. | 15490482. | 16010156. | 28405837. | 17717404. | 92246539. |

**14 First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

**Section C. Computation of Public Support Percentage**

|   |           |         |
|---|-----------|---------|
| <b>15</b> Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f)) | <b>15</b> | 73.42 % |
| <b>16</b> Public support percentage from 2022 Schedule A, Part III, line 15                       | <b>16</b> | 71.81 % |

**Section D. Computation of Investment Income Percentage**

|  |           |        |
|--|-----------|--------|
| <b>17</b> Investment income percentage for 2023 (line 10c, column (f), divided by line 13, column (f)) | <b>17</b> | 9.77 % |
| <b>18</b> Investment income percentage from 2022 Schedule A, Part III, line 17                         | <b>18</b> | 9.77 % |

**19a 33 1/3% support tests - 2023.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

**b 33 1/3% support tests - 2022.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions



**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

|  | Yes | No |
|--|-----|----|
| <b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>  |     |    |
| <b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>   |     |    |
| <b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>   |     |    |
| <b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>   |     |    |
| <b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>  |     |    |
| <b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>  |     |    |
| <b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>  |     |    |
| <b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>   |     |    |
| <b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i> |     |    |
| <b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?   |     |    |
| <b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?  |     |    |
| <b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>  |     |    |
| <b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>  |     |    |
| <b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>  |     |    |
| <b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>   |     |    |
| <b>b</b> Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>  |     |    |
| <b>c</b> Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>   |     |    |
| <b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>  |     |    |
| <b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>   |     |    |

**Part IV Supporting Organizations** (continued)

|  | Yes | No |
|--|-----|----|
| <b>11</b> Has the organization accepted a gift or contribution from any of the following persons?  |     |    |
| <b>a</b> A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization? |     |    |
| <b>b</b> A family member of a person described on line 11a above?  |     |    |
| <b>c</b> A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.</i>                              |     |    |
| <b>11a</b>   |     |    |
| <b>11b</b>   |     |    |
| <b>11c</b>   |     |    |

**Section B. Type I Supporting Organizations**

|   | Yes | No |
|---|-----|----|
| <b>1</b> Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i> |     |    |
| <b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>   |     |    |
| <b>1</b>  |     |    |
| <b>2</b>  |     |    |

**Section C. Type II Supporting Organizations**

|  | Yes | No |
|--|-----|----|
| <b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i> |     |    |
| <b>1</b>   |     |    |

**Section D. All Type III Supporting Organizations**

|   | Yes | No |
|---|-----|----|
| <b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? |     |    |
| <b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>   |     |    |
| <b>3</b> By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>  |     |    |
| <b>1</b>  |     |    |
| <b>2</b>  |     |    |
| <b>3</b>  |     |    |

**Section E. Type III Functionally Integrated Supporting Organizations**

|   |  |  |
|---|--|--|
| <b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).  |  |  |
| <b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.  |  |  |
| <b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.   |  |  |
| <b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).   |  |  |
| <b>2</b> Activities Test. Answer lines 2a and 2b below.   |  |  |
| <b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i> |  |  |
| <b>b</b> Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>  |  |  |
| <b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.   |  |  |
| <b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No" provide details in Part VI.</i>   |  |  |
| <b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>   |  |  |
| <b>2a</b>   |  |  |
| <b>2b</b>   |  |  |
| <b>3a</b>   |  |  |
| <b>3b</b>   |  |  |

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

1  Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 ( explain in Part VI). See instructions.  
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

| Section A - Adjusted Net Income |  | (A) Prior Year | (B) Current Year (optional) |
|---------------------------------|--|----------------|-----------------------------|
| 1                               | Net short-term capital gain  | 1              |                             |
| 2                               | Recoveries of prior-year distributions   | 2              |                             |
| 3                               | Other gross income (see instructions)  | 3              |                             |
| 4                               | Add lines 1 through 3.   | 4              |                             |
| 5                               | Depreciation and depletion   | 5              |                             |
| 6                               | Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | 6              |                             |
| 7                               | Other expenses (see instructions)  | 7              |                             |
| 8                               | <b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)  | 8              |                             |

| Section B - Minimum Asset Amount |   | (A) Prior Year | (B) Current Year (optional) |
|----------------------------------|---|----------------|-----------------------------|
| 1                                | Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year): |                |                             |
| a                                | Average monthly value of securities   | 1a             |                             |
| b                                | Average monthly cash balances   | 1b             |                             |
| c                                | Fair market value of other non-exempt-use assets  | 1c             |                             |
| d                                | <b>Total</b> (add lines 1a, 1b, and 1c)   | 1d             |                             |
| e                                | <b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI):   |                |                             |
| 2                                | Acquisition indebtedness applicable to non-exempt-use assets  | 2              |                             |
| 3                                | Subtract line 2 from line 1d.   | 3              |                             |
| 4                                | Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).                                  | 4              |                             |
| 5                                | Net value of non-exempt-use assets (subtract line 4 from line 3)  | 5              |                             |
| 6                                | Multiply line 5 by 0.035.   | 6              |                             |
| 7                                | Recoveries of prior-year distributions  | 7              |                             |
| 8                                | <b>Minimum Asset Amount</b> (add line 7 to line 6)  | 8              |                             |

| Section C - Distributable Amount |   |   | Current Year |
|----------------------------------|---|---|--------------|
| 1                                | Adjusted net income for prior year (from Section A, line 8, column A)   | 1 |              |
| 2                                | Enter 0.85 of line 1.   | 2 |              |
| 3                                | Minimum asset amount for prior year (from Section B, line 8, column A)  | 3 |              |
| 4                                | Enter greater of line 2 or line 3.  | 4 |              |
| 5                                | Income tax imposed in prior year  | 5 |              |
| 6                                | <b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).   | 6 |              |
| 7                                | <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions). |   |              |

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)

| Section D - Distributions |  | Current Year |
|---------------------------|--|--------------|
| 1                         | Amounts paid to supported organizations to accomplish exempt purposes  | 1            |
| 2                         | Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity      | 2            |
| 3                         | Administrative expenses paid to accomplish exempt purposes of supported organizations  | 3            |
| 4                         | Amounts paid to acquire exempt-use assets  | 4            |
| 5                         | Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)   | 5            |
| 6                         | Other distributions (describe in Part VI). See instructions.   | 6            |
| 7                         | <b>Total annual distributions.</b> Add lines 1 through 6.  | 7            |
| 8                         | Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions. | 8            |
| 9                         | Distributable amount for 2023 from Section C, line 6   | 9            |
| 10                        | Line 8 amount divided by line 9 amount   | 10           |

| Section E - Distribution Allocations (see instructions) | (i)<br>Excess Distributions   | (ii)<br>Underdistributions<br>Pre-2023 | (iii)<br>Distributable<br>Amount for 2023 |
|---|---|--|---|
| 1   | Distributable amount for 2023 from Section C, line 6  |  |   |
| 2   | Underdistributions, if any, for years prior to 2023 (reasonable cause required - explain in Part VI). See instructions.   |  |   |
| 3   | Excess distributions carryover, if any, to 2023   |  |   |
| a   | From 2018   |  |   |
| b   | From 2019   |  |   |
| c   | From 2020   |  |   |
| d   | From 2021   |  |   |
| e   | From 2022   |  |   |
| f   | <b>Total</b> of lines 3a through 3e   |  |   |
| g   | Applied to underdistributions of prior years  |  |   |
| h   | Applied to 2023 distributable amount  |  |   |
| i   | Carryover from 2018 not applied (see instructions)  |  |   |
| j   | Remainder. Subtract lines 3g, 3h, and 3i from line 3f.  |  |   |
| 4   | Distributions for 2023 from Section D, line 7: \$   |  |   |
| a   | Applied to underdistributions of prior years  |  |   |
| b   | Applied to 2023 distributable amount  |  |   |
| c   | Remainder. Subtract lines 4a and 4b from line 4.  |  |   |
| 5   | Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions. |  |   |
| 6   | Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.                        |  |   |
| 7   | <b>Excess distributions carryover to 2024.</b> Add lines 3j and 4c.   |  |   |
| 8   | Breakdown of line 7:  |  |   |
| a   | Excess from 2019  |  |   |
| b   | Excess from 2020  |  |   |
| c   | Excess from 2021  |  |   |
| d   | Excess from 2022  |  |   |
| e   | Excess from 2023  |  |   |



SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the organization CATHOLIC SCHOOLS FOUNDATION, INC. Employer identification number 22-2485502

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate value of contributions, grants, and end of year, and two Yes/No questions regarding donor property and grant fund usage.

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

Form for Part II Conservation Easements. Includes questions about purpose of easements, number of easements, acreage, and monitoring expenses. Includes a table for 'Held at the End of the Tax Year' with rows 2a, 2b, 2c, and 2d.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Form for Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Includes questions about reporting works of art and historical treasures, and a table for reporting revenue and assets.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange program
  - e  Other \_\_\_\_\_
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- |                                 | Amount |
|---------------------------------|--------|
| c Beginning balance             | 1c     |
| d Additions during the year     | 1d     |
| e Distributions during the year | 1e     |
| f Ending balance                | 1f     |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII

**Part V Endowment Funds** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

|  | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|--|------------------|----------------|--------------------|----------------------|---------------------|
| 1a Beginning of year balance                     | 72,829,854.      | 58,633,938.    | 66,108,378.        | 50,263,856.          | 48,109,198.         |
| b Contributions                                  | 1,989,075.       | 11,453,487.    | 3,111,000.         | 3,105,000.           | 2,055,000.          |
| c Net investment earnings, gains, and losses     | 8,730,872.       | 5,591,022.     | -8,052,177.        | 15,188,154.          | 1,780,130.          |
| d Grants or scholarships                         | 3,276,866.       | 2,848,593.     | 2,533,263.         | 2,448,632.           | 1,680,472.          |
| e Other expenditures for facilities and programs |                  |                |                    |                      |                     |
| f Administrative expenses                        |                  |                |                    |                      |                     |
| g End of year balance                            | 80,272,935.      | 72,829,854.    | 58,633,938.        | 66,108,378.          | 50,263,856.         |

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment 1.2400 %
  - b Permanent endowment 75.3500 %
  - c Term endowment 23.4100 %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |                              | Yes | No |
|------------------------------|-----|----|
| (i) Unrelated organizations? |     | X  |
| (ii) Related organizations?  | X   |    |
- b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment** Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

| Description of property   | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|---|--------------------------------------|---------------------------------|------------------------------|----------------|
| 1a Land   |                                      |                                 |                              |                |
| b Buildings   |                                      |                                 |                              |                |
| c Leasehold improvements  |                                      | 11,217.                         | 10,823.                      | 394.           |
| d Equipment   |                                      | 93,510.                         | 90,226.                      | 3,284.         |
| e Other   |                                      | 29,067.                         | 28,046.                      | 1,021.         |
| <b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B)) |                                      |                                 |                              | 4,699.         |

**Part VII Investments - Other Securities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

| (a) Description of security or category (including name of security)    | (b) Book value | (c) Method of valuation: Cost or end-of-year market value |
|---|----------------|---|
| (1) Financial derivatives .....   |                |   |
| (2) Closely held equity interests .....                                 |                |   |
| (3) Other .....   |                |   |
| (A)   |                |   |
| (B)   |                |   |
| (C)   |                |   |
| (D)   |                |   |
| (E)   |                |   |
| (F)   |                |   |
| (G)   |                |   |
| (H)   |                |   |
| <b>Total.</b> (Col. (b) must equal Form 990, Part X, line 12, col. (B)) |                |   |

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

| (a) Description of investment   | (b) Book value | (c) Method of valuation: Cost or end-of-year market value |
|---|----------------|---|
| (1)   |                |   |
| (2)   |                |   |
| (3)   |                |   |
| (4)   |                |   |
| (5)   |                |   |
| (6)   |                |   |
| (7)   |                |   |
| (8)   |                |   |
| (9)   |                |   |
| <b>Total.</b> (Col. (b) must equal Form 990, Part X, line 13, col. (B)) |                |   |

**Part IX Other Assets**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

| (a) Description   | (b) Book value |
|---|----------------|
| (1)   |                |
| (2)   |                |
| (3)   |                |
| (4)   |                |
| (5)   |                |
| (6)   |                |
| (7)   |                |
| (8)   |                |
| (9)   |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, line 15, col. (B)) |                |

**Part X Other Liabilities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

| 1. (a) Description of liability   | (b) Book value |
|---|----------------|
| (1) Federal income taxes  |                |
| (2) OPERATING LEASE LIABILITY   | 155,098.       |
| (3)   |                |
| (4)   |                |
| (5)   |                |
| (6)   |                |
| (7)   |                |
| (8)   |                |
| (9)   |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, line 25, col. (B)) | 155,098.       |

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ...



**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

|   |   |    |             |             |
|---|---|----|-------------|-------------|
| 1 | Total revenue, gains, and other support per audited financial statements        |    | 1           | 30,454,286. |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12:             |    |             |             |
| a | Net unrealized gains (losses) on investments                                    | 2a | 11,584,245. |             |
| b | Donated services and use of facilities  | 2b | 30,000.     |             |
| c | Recoveries of prior year grants   | 2c |             |             |
| d | Other (Describe in Part XIII.)  | 2d | 388,304.    |             |
| e | Add lines 2a through 2d   | 2e |             | 12,002,549. |
| 3 | Subtract line 2e from line 1  | 3  |             | 18,451,737. |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1:            |    |             |             |
| a | Investment expenses not included on Form 990, Part VIII, line 7b                | 4a |             |             |
| b | Other (Describe in Part XIII.)  | 4b | -372,416.   |             |
| c | Add lines 4a and 4b   | 4c |             | -372,416.   |
| 5 | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.) | 5  |             | 18,079,321. |

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

|   |  |    |          |             |
|---|--|----|----------|-------------|
| 1 | Total expenses and losses per audited financial statements                       |    | 1        | 19,758,389. |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25:                |    |          |             |
| a | Donated services and use of facilities   | 2a | 30,000.  |             |
| b | Prior year adjustments   | 2b |          |             |
| c | Other losses   | 2c |          |             |
| d | Other (Describe in Part XIII.)   | 2d | 372,416. |             |
| e | Add lines 2a through 2d  | 2e |          | 402,416.    |
| 3 | Subtract line 2e from line 1   | 3  |          | 19,355,973. |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1:               |    |          |             |
| a | Investment expenses not included on Form 990, Part VIII, line 7b                 | 4a |          |             |
| b | Other (Describe in Part XIII.)   | 4b |          |             |
| c | Add lines 4a and 4b  | 4c |          | 0.          |
| 5 | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.) | 5  |          | 19,355,973. |

**Part XIII Supplemental Information**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**PART X, LINE 2:**

THE FOUNDATION ACCOUNTS FOR UNCERTAINTY IN INCOME TAXES IN ACCORDANCE WITH ASC TOPIC, INCOME TAXES. THIS STANDARD CLARIFIES THE ACCOUNTING FOR UNCERTAINTY IN TAX POSITIONS AND PRESCRIBES A RECOGNITION THRESHOLD AND MEASUREMENT ATTRIBUTE FOR THE FINANCIAL STATEMENTS REGARDING A TAX POSITION TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN. THE FOUNDATION HAS DETERMINED THAT THERE ARE NO UNCERTAIN TAX POSITIONS WHICH QUALIFY FOR EITHER RECOGNITION OR DISCLOSURE IN THE FINANCIAL STATEMENTS AT JUNE 30, 2024.

**PART XI, LINE 2D - OTHER ADJUSTMENTS:**

CHANGE IN VALUE OF INTEREST IN RELATED PARTY 388,304.

**Part XIII** Supplemental Information (continued)

PART XI, LINE 4B - OTHER ADJUSTMENTS:

FUNDRAISING EXPENSES INCLUDED IN REVENUE ON FORM 990 -372,416.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

FUNDRAISING EXPENSES INCLUDED IN REVENUE ON FORM 990 372,416.

SCHEDULE G  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public  
Inspection

Name of the organization: CATHOLIC SCHOOLS FOUNDATION, INC. Employer identification number: 22-2485502

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

- 1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.
a Mail solicitations, b Internet and email solicitations, c Phone solicitations, d In-person solicitations, e Solicitation of non-government grants, f Solicitation of government grants, g Special fundraising events.
2 a Did the organization have a written or oral agreement with any individual... b If "Yes," list the 10 highest paid individuals or entities...

Table with 6 columns: (i) Name and address of individual or entity (fundraiser), (ii) Activity, (iii) Did fundraiser have custody or control of contributions? (Yes/No), (iv) Gross receipts from activity, (v) Amount paid to (or retained by) fundraiser listed in col. (i), (vi) Amount paid to (or retained by) organization.

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

|                 |  | (a) Event #1  | (b) Event #2                         | (c) Other events       | (d) Total events<br>(add col. (a) through<br>col. (c)) |
|-----------------|--|---|--------------------------------------|------------------------|--|
|                 |  | 3300 DINNER<br>(event type)                                 | 3625 TRIVIA<br>NIGHT<br>(event type) | NONE<br>(total number) |  |
| Revenue         | 1  | 4,775,431.  | 20,270.                              |                        | 4,795,701.   |
|                 | 2  | 4,743,631.  | 19,595.                              |                        | 4,763,226.   |
|                 | 3  | 31,800.   | 675.                                 |                        | 32,475.  |
| Direct Expenses | 4  |   |                                      |                        |  |
|                 | 5  |   |                                      |                        |  |
|                 | 6  |   |                                      |                        |  |
|                 | 7  | 301,453.  | 5,000.                               |                        | 306,453.   |
|                 | 8  |   |                                      |                        |  |
|                 | 9  | 64,180.   | 1,783.                               |                        | 65,963.  |
|                 | 10   | Direct expense summary. Add lines 4 through 9 in column (d) |                                      |                        |  |
| 11              | Net income summary. Subtract line 10 from line 3, column (d) |   |                                      |                        | -339,941.  |

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

|                 |   | (a) Bingo   | (b) Pull tabs/instant<br>bingo/progressive bingo                    | (c) Other gaming | (d) Total gaming (add<br>col. (a) through col. (c)) |
|-----------------|---|---|---|------------------|---|
|                 |   |   |   |                  |   |
| Revenue         | 1   |   |   |                  |   |
|                 | 2   |   |   |                  |   |
| Direct Expenses | 3   |   |   |                  |   |
|                 | 4   |   |   |                  |   |
|                 | 5   |   |   |                  |   |
| 6               | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No |                  |   |
| 7               | Direct expense summary. Add lines 2 through 5 in column (d)         |   |   |                  |   |
| 8               | Net gaming income summary. Subtract line 7 from line 1, column (d)  |   |   |                  |   |

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_

a Is the organization licensed to conduct gaming activities in each of these states?  Yes  No

b If "No," explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year?  Yes  No

b If "Yes," explain: \_\_\_\_\_

- 11 Does the organization conduct gaming activities with nonmembers?  Yes  No
- 12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming?  Yes  No

- 13 Indicate the percentage of gaming activity conducted in:
 

|                               |            |   |
|-------------------------------|------------|---|
| a The organization's facility | <b>13a</b> | % |
| b An outside facility         | <b>13b</b> | % |

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name \_\_\_\_\_

Address \_\_\_\_\_

- 15a Does the organization have a contract with a third party from whom the organization receives gaming revenue?  Yes  No

- b If "Yes," enter the amount of gaming revenue received by the organization \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party \$ \_\_\_\_\_
- c If "Yes," enter name and address of the third party:

Name \_\_\_\_\_

Address \_\_\_\_\_

16 Gaming manager information:

Name \_\_\_\_\_

Gaming manager compensation \$ \_\_\_\_\_

Description of services provided \_\_\_\_\_

\_\_\_\_\_

Director/officer       Employee       Independent contractor

17 Mandatory distributions:

- a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?  Yes  No
- b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$ \_\_\_\_\_

**Part IV Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.  
**Attach to Form 990.**  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

**Open to Public  
Inspection**

Name of the organization **CATHOLIC SCHOOLS FOUNDATION, INC.** Employer identification number **22-2485502**

**Part I General Information on Grants and Assistance**

- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  **Yes**  **No**
- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

| <b>1 (a)</b> Name and address of organization or government                                 | <b>(b)</b> EIN | <b>(c)</b> IRC section (if applicable) | <b>(d)</b> Amount of cash grant | <b>(e)</b> Amount of noncash assistance | <b>(f)</b> Method of valuation (book, FMV, appraisal, other) | <b>(g)</b> Description of noncash assistance | <b>(h)</b> Purpose of grant or assistance |
|---|----------------|--|---------------------------------|---|--|--|---|
| ACADEMY OF NOTRE DAME ELEMENTARY SCHOOL, TYNGSBORO - 180 MIDDLESEX RD - TYNGSBORO, MA 01879 | 04-2103721     | 501C3                                  | 113,285.                        | 0.                                      |  |  | SCHOLARSHIP SUPPORT                       |
| ACADEMY OF NOTRE DAME HIGH SCHOOL, TYNGSBORO - 180 MIDDLESEX RD - TYNGSBORO, MA 01879       | 04-2103721     | 501C3                                  | 87,800.                         | 0.                                      |  |  | SCHOLARSHIP SUPPORT                       |
| ARCHBISHOP WILLIAMS HIGH SCHOOL, BRAINTREE - 80 INDEPENDENCE AVE - BRAINTREE, MA 02184      | 56-2438555     | 501C3                                  | 178,300.                        | 0.                                      |  |  | SCHOLARSHIP SUPPORT                       |
| ARLINGTON CATHOLIC HIGH SCHOOL, ARLINGTON - 16 MEDFORD ST - ARLINGTON, MA 02474             | 04-2106235     | 501C3                                  | 467,500.                        | 0.                                      |  |  | SCHOLARSHIP SUPPORT                       |
| AUSTIN PREPARATORY SCHOOL, READING 101 WILLOW ST READING, MA 01867                          | 04-2314298     | 501C3                                  | 17,000.                         | 0.                                      |  |  | SCHOLARSHIP SUPPORT                       |
| BELLESINI ACADEMY, LAWRENCE 94 BRADFORD ST LAWRENCE, MA 01940                               | 04-3585445     | 501C3                                  | 75,000.                         | 0.                                      |  |  | SCHOLARSHIP SUPPORT                       |

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table **80.**
- 3** Enter total number of other organizations listed in the line 1 table

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) 2023

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government                                       | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|--|------------|-------------------------------|--------------------------|----------------------------------|---|--|--|
| BISHOP FENWICK HIGH SCHOOL,<br>PEABODY - 99 MARGIN ST - PEABODY,<br>MA 01960             | 56-2438553 | 501C3                         | 174,500.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| BLESSED SACRAMENT SCHOOL, WALPOLE<br>808 EAST ST<br>WALPOLE, MA 02081                    | 04-2106165 | 501C3                         | 12,960.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| BOSTON COLLEGE EXPERIENCE<br>140 COMMONWEALTH AVE<br>CHESTNUT HILL, MA 02467             | 04-2103545 | 501C3                         | 14,000.                  | 0.                               |   |  | NON-SCHOLARSHIP SUPPORT                    |
| BOSTON COLLEGE HIGH SCHOOL,<br>DORCHESTER - 150 MORRISSEY BLVD -<br>DORCHESTER, MA 02125 | 04-2103899 | 501C3                         | 136,000.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| BOSTON SYMPHONY ORCHESTRA<br>301 MASSACHUSETTS AVE<br>BOSTON, MA 02115                   | 04-2103550 | 501C3                         | 9,170.                   | 0.                               |   |  | NON-SCHOLARSHIP SUPPORT                    |
| CAMPAIGN FOR CATHOLIC SCHOOLS<br>66 BROOKS DR<br>BRAintree, MA 02184                     | 26-2290458 | 501C3                         | 25,000.                  | 0.                               |   |  | NON-SCHOLARSHIP SUPPORT                    |
| CARDINAL SPELLMAN HIGH SCHOOL,<br>BROCKTON - 738 COURT ST -<br>BROCKTON, MA 02302        | 56-2438440 | 501C3                         | 635,550.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| CATHEDRAL HIGH SCHOOL, BOSTON<br>74 UNION PARK ST<br>BOSTON, MA 02118                    | 56-2438574 | 501C3                         | 614,509.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| CATHOLIC MEMORIAL SCHOOL, WEST<br>ROXBURY - 235 BAKER ST - WEST<br>ROXBURY, MA 02132     | 04-2229971 | 501C3                         | 192,950.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |

Schedule I (Form 990)



**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government  | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|---|------------|-------------------------------|--------------------------|----------------------------------|---|--|--|
| CENTRAL CATHOLIC HIGH SCHOOL,<br>LAWRENCE - 300 HAMPSHIRE ST -<br>LAWRENCE, MA 01841          | 04-2057906 | 501C3                         | 412,710.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| CHEVERUS CATHOLIC SCHOOL, MALDEN<br>30 IRVING ST<br>MALDEN, MA 02148                          | 45-3454740 | 501C3                         | 89,250.                  | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| CITY CONNECTS OFFICE<br>140 COMMONWEALTH AVE<br>CHESTNUT HILL, MA 02467                       | 04-2103545 | 501C3                         | 150,800.                 | 0.                               |   |  | NON-SCHOLARSHIP SUPPORT                    |
| CRISTO REY BOSTON HIGH SCHOOL,<br>DORCHESTER - 100 SAVIN HILL AVE -<br>DORCHESTER, MA 02125   | 56-2438544 | 501C3                         | 218,000.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| EAST BOSTON CENTRAL CATHOLIC<br>SCHOOL, EAST BOSTON - 69 LONDON ST<br>- EAST BOSTON, MA 02128 | 04-2573582 | 501C3                         | 236,635.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| FONTBONNE ACADEMY, MILTON<br>930 BROOK RD<br>MILTON, MA 02186                                 | 04-3424717 | 501C3                         | 459,500.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| HOLY NAME SCHOOL, WEST ROXBURY<br>535 WEST ROXBURY PARKWAY<br>WEST ROXBURY, MA 02132          | 80-0754290 | 501C3                         | 12,810.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| IMMACULATE CONCEPTION SCHOOL,<br>LOWELL - 218 E. MERRIMACK ST -<br>LOWELL, MA 01852           | 04-2106189 | 501C3                         | 307,756.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| IMMACULATE CONCEPTION SCHOOL,<br>NEWBURYPORT - 1 WASHINGTON ST -<br>NEWBURYPORT, MA 01950     | 04-2106193 | 501C3                         | 20,670.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government   | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|--|------------|-------------------------------|--------------------------|----------------------------------|---|--|--|
| IMMACULATE CONCEPTION SCHOOL,<br>REVERE - 127 WINTHROP AVE -<br>REVERE, MA 02151             | 61-1660885 | 501C3                         | 370,965.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| LAWRENCE CATHOLIC ACADEMY,<br>LAWRENCE - 101 PARKER ST -<br>LAWRENCE, MA 01843               | 27-2281636 | 501C3                         | 896,160.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| LOWELL CATHOLIC SCHOOL, LOWELL<br>530 STEVENS ST<br>LOWELL, MA 01851                         | 04-2563657 | 501C3                         | 586,785.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| LYNCH LEADERSHIP ACADEMY<br>BOSTON COLLEGE 140 COMMONWEALTH AVE<br>CHESTNUT HILL, MA 02467   | 04-2103545 | 501C3                         | 100,000.                 | 0.                               |   |  | NON-SCHOLARSHIP SUPPORT                    |
| MALDEN CATHOLIC HIGH SCHOOL,<br>MALDEN - 99 CRYSTAL ST - MALDEN,<br>MA 02148                 | 04-2393983 | 501C3                         | 457,850.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| MOTHER CAROLINE ACADEMY,<br>DORCHESTER - 515 BLUE HILL AVE -<br>DORCHESTER, MA 02121         | 04-3163180 | 501C3                         | 50,000.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| MOUNT ALVERNIA ACADEMY, CHESTNUT<br>HILL - 20 MANET RD - CHESTNUT<br>HILL, MA 02467          | 04-2488987 | 501C3                         | 7,000.                   | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| NATIVITY PREPARATORY SCHOOL,<br>JAMAICA PLAIN - 39 LAMARTINE ST -<br>JAMAICA PLAIN, MA 02130 | 04-3063140 | 501C3                         | 50,000.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| NEWTON COUNTRY DAY SCHOOL, NEWTON<br>785 CENTRE ST<br>NEWTON, MA 02458                       | 04-2541393 | 501C3                         | 33,000.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government                                     | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|--|------------|-------------------------------|--------------------------|----------------------------------|---|--|--|
| NOTRE DAME ACADEMY, HINGHAM<br>1073 MAIN ST<br>HINGHAM, MA 02043                       | 04-2143551 | 501C3                         | 40,000.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| NOTRE DAME CRISTO REY HIGH SCHOOL,<br>METHUEN - 203 LAWRENCE ST -<br>METHUEN, MA 01844 | 86-1096574 | 501C3                         | 233,690.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| OLPH MISSION GRAMMAR SCHOOL,<br>ROXBURY - 94 SAINT ALPHONSUS ST -<br>ROXBURY, MA 02120 | 04-2106198 | 501C3                         | 660,635.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| OUR LADY OF THE ASSUMPTION SCHOOL,<br>LYNNFIELD - 40 GROVE ST -<br>LYNNFIELD, MA 01940 | 04-5331619 | 501C3                         | 37,860.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| OUR LADY'S ACADEMY, WALTHAM<br>920 TRAPELO RD<br>WALTHAM, MA 02452                     | 45-3368113 | 501C3                         | 87,795.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| QUINCY CATHOLIC ACADEMY, QUINCY<br>370 HANCOCK ST<br>QUINCY, MA 02171                  | 27-2235451 | 501C3                         | 41,710.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| REGIS COLLEGE, WESTON, MA<br>235 WELLESLEY STREET<br>WESTON, MA 02493                  | 04-2104451 | 501C3                         | 37,300.                  | 0.                               |   |  | NON-SCHOLARSHIP SUPPORT                    |
| SACRED HEART SCHOOL, KINGSTON<br>329 BISHOPS HIGHWAY<br>KINGSTON, MA 02364             | 36-4704238 | 501C3                         | 36,750.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SACRED HEART SCHOOL, ROSLINDALE<br>1035 CANTERBURY ST<br>ROSLINDALE, MA 02131          | 04-3292732 | 501C3                         | 359,515.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government                                  | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|---|------------|-------------------------------|--------------------------|----------------------------------|---|--|--|
| SACRED HEART SCHOOL, WEYMOUTH<br>75 COMMERCIAL ST<br>WEYMOUTH, MA 02188             | 32-0354179 | 501C3                         | 96,340.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SACRED HEARTS SCHOOL, HAVERHILL<br>31 SOUTH CHESTNUT ST<br>HAVERHILL, MA 01835      | 45-3581807 | 501C3                         | 55,630.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT AGATHA SCHOOL, MILTON<br>440 ADAMS ST<br>MILTON, MA 02186                     | 04-2106234 | 501C3                         | 51,840.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT AGNES SCHOOL, ARLINGTON<br>39 MEDFORD ST<br>ARLINGTON, MA 02474               | 45-3674994 | 501C3                         | 80,980.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT ANTHONY SCHOOL, EVERETT<br>54 OAKES ST<br>EVERETT, MA 01249                   | 04-2214864 | 501C3                         | 214,920.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT AUGUSTINE SCHOOL, ANDOVER<br>26 CENTRAL ST<br>ANDOVER, MA 01810               | 04-2106248 | 501C3                         | 20,950.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT BRIDGET SCHOOL, ABINGTON<br>455 PLYMOUTH ST<br>ABINGTON, MA 02351             | 45-3273690 | 501C3                         | 77,800.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT BRIDGET SCHOOL, FRAMINGHAM<br>832 WORCESTER RD<br>FRAMINGHAM, MA 01702        | 90-0765624 | 501C3                         | 153,240.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| SAINT CATHERINE OF SIENA SCHOOL,<br>NORWOOD - 249 NAHATAN ST -<br>NORWOOD, MA 02062 | 45-3363627 | 501C3                         | 129,870.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government  | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|---|------------|-------------------------------|--------------------------|----------------------------------|---|--|--|
| SAINT CHARLES SCHOOL, WOBURN<br>8 MYRTLE ST<br>WOBURN, MA 01801                                       | 04-2106263 | 501C3                         | 12,390.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT COLUMBKILLE PARTNERSHIP<br>SCHOOL, BRIGHTON - 25 ARLINGTON ST<br>- BRIGHTON, MA 01235           | 20-5509269 | 501C3                         | 390,390.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT FRANCIS XAVIER SCHOOL,<br>WEYMOUTH - 234 PLEASANT ST -<br>WEYMOUTH, MA 02190                    | 27-5366748 | 501C3                         | 95,520.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT JOHN PAUL II CATHOLIC<br>ACADEMY, DORCHESTER - 2200<br>DORCHESTER AVE - DORCHESTER, MA<br>02124 | 26-2607406 | 501C3                         | 1,274,197.               | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| SAINT JOHN THE BAPTIST SCHOOL,<br>PEABODY - 19 CHESTNUT ST -<br>PEABODY, MA 01960                     | 45-3364232 | 501C3                         | 102,170.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| SAINT JOHN THE EVANGELIST SCHOOL,<br>CANTON - 696 WASHINGTON ST -<br>CANTON, MA 02021                 | 45-3526623 | 501C3                         | 26,750.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT JOHN'S PREPARATORY SCHOOL,<br>DANVERS - 72 SPRING ST - DANVERS,<br>MA 01923                     | 04-2104875 | 501C3                         | 123,500.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT JOSEPH SCHOOL, MEDFORD<br>132 HIGH ST<br>MEDFORD, MA 02155                                      | 45-3316763 | 501C3                         | 102,945.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT JOSEPH SCHOOL, WAKEFIELD<br>15 GOULD ST<br>WAKEFIELD, MA 01880                                  | 45-3366515 | 501C3                         | 22,440.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government                                    | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|---|------------|-------------------------------|--------------------------|----------------------------------|---|--|--|
| SAINT MARY HIGH SCHOOL, LYNN<br>35 TREMONT ST<br>LYNN, MA 02132                       | 04-3106338 | 501C3                         | 456,530.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT MARY OF THE ANNUNCIATION SCHOOL, MELROSE - 4 MYRTLE ST - MELROSE, MA 02176      | 45-3340746 | 501C3                         | 10,320.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT MARY OF THE ASSUMPTION SCHOOL, BROOKLINE - 67 HARVARD ST - BROOKLINE, MA 02445  | 45-3528078 | 501C3                         | 23,000.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT MARY OF THE HILLS SCHOOL, MILTON - 250 BROOK RD - MILTON, MA 02186              | 45-3415544 | 501C3                         | 201,175.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT MICHAEL SCHOOL, LOWELL<br>21 SIXTH ST<br>LOWELL, MA 01850                       | 45-3339852 | 501C3                         | 203,817.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| SAINT MICHAEL SCHOOL, NORTH ANDOVER - 80 MAPLE AVE - NORTH ANDOVER, MA 01845          | 32-0354127 | 501C3                         | 91,100.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT MONICA SCHOOL, METHUEN<br>212 LAWRENCE ST<br>METHUEN, MA 01844                  | 37-1648909 | 501C3                         | 101,950.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT PATRICK SCHOOL AND EDUCATIONAL CENTER, LOWELL - 311 ADAMS ST - LOWELL, MA 01854 | 20-1566134 | 501C3                         | 254,095.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| SAINT PAUL SCHOOL, HINGHAM<br>18 FEARING RD<br>HINGHAM, MA 02043                      | 45-3325867 | 501C3                         | 21,500.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government   | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|--|------------|-------------------------------|--------------------------|----------------------------------|---|--|--|
| SAINT PETER SCHOOL, CAMBRIDGE<br>96 CONCORD ST<br>CAMBRIDGE, MA 02138                          | 04-2106360 | 501C3                         | 92,560.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT PIUS V SCHOOL, LYNN<br>28 BOWLER ST<br>LYNN, MA 01904                                    | 45-3340187 | 501C3                         | 244,290.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT RAPHAEL SCHOOL, MEDFORD<br>516 HIGH ST<br>MEDFORD, MA 02155                              | 45-3477043 | 501C3                         | 42,950.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT THERESA OF AVILA SCHOOL,<br>WEST ROXBURY - 40 ST THERESA AVE -<br>WEST ROXBURY, MA 02132 | 45-3272976 | 501C3                         | 74,760.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| SAINT THERESA SCHOOL, SOMERVILLE<br>192 SUMMER ST<br>SOMERVILLE, MA 02143                      | 04-2106260 | 501C3                         | 307,087.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| SOUTH BOSTON CATHOLIC ACADEMY,<br>SOUTH BOSTON - 866 EAST BROADWAY -<br>SOUTH BOSTON, MA 02127 | 04-2106255 | 501C3                         | 73,285.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| THE CATHOLIC COMMUNITY FUND<br>66 BROOKS DR<br>BRAintree, MA 02184                             | 04-3071454 | 501C3                         | 1,381,795.               | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |
| THE SAINTS ACADEMY, BEVERLY<br>111 NEW BALCH ST<br>BEVERLY, MA 01915                           | 45-3264587 | 501C3                         | 37,830.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                        |
| TRINITY CATHOLIC ACADEMY, BROCKTON<br>37 ERIE AVE<br>BROCKTON, MA 02302                        | 51-0638517 | 501C3                         | 707,150.                 | 0.                               |   |  | SCHOLARSHIP AND<br>NON-SCHOLARSHIP SUPPORT |

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government  | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|------------|-------------------------------|--------------------------|----------------------------------|---|--|------------------------------------|
| URSULINE ACADEMY, DEDHAM<br>85 LOWDER ST<br>DEDHAM, MA 02026                              | 04-2121654 | 501C3                         | 146,915.                 | 0.                               |   |  | SCHOLARSHIP SUPPORT                |
| XAVERIAN BROTHERS HIGH SCHOOL,<br>WESTWOOD - 800 CLAPBOARDTREE ST -<br>WESTWOOD, MA 02090 | 04-2314036 | 501C3                         | 20,500.                  | 0.                               |   |  | SCHOLARSHIP SUPPORT                |
|   |            |                               |                          |                                  |   |  |                                    |
|   |            |                               |                          |                                  |   |  |                                    |
|   |            |                               |                          |                                  |   |  |                                    |
|   |            |                               |                          |                                  |   |  |                                    |
|   |            |                               |                          |                                  |   |  |                                    |
|   |            |                               |                          |                                  |   |  |                                    |
|   |            |                               |                          |                                  |   |  |                                    |
|   |            |                               |                          |                                  |   |  |                                    |
|   |            |                               |                          |                                  |   |  |                                    |
|   |            |                               |                          |                                  |   |  |                                    |



**Part III Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.  
Part III can be duplicated if additional space is needed.

| (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of non-cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|---------------------------------|--------------------------|--------------------------|-----------------------------------|---|---------------------------------------|
|                                 |                          |                          |                                   |   |                                       |
|                                 |                          |                          |                                   |   |                                       |
|                                 |                          |                          |                                   |   |                                       |
|                                 |                          |                          |                                   |   |                                       |
|                                 |                          |                          |                                   |   |                                       |
|                                 |                          |                          |                                   |   |                                       |

**Part IV Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

PART I, LINE 2:

THE CATHOLIC SCHOOLS FOUNDATION REQUIRES SCHOLARSHIP FUNDING TO BE ASSIGNED TO INDIVIDUAL STUDENTS BY A DESIGNATED DEADLINE EACH FISCAL YEAR. SCHOLARSHIP RECIPIENT INFORMATION, INCLUDING ENROLLMENT AND FINANCIAL NEED, IS THEN VERIFIED MINIMALLY TWO TIMES PER YEAR. NON-SCHOLARSHIP GRANTS ARE MONITORED THROUGH GRANT AGREEMENTS AND INTERIM AND FINAL REPORTS WHEN REQUIRED.

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

For certain Officers, Directors, Trustees, Key Employees, and Highest  
Compensated Employees  
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.  
Attach to Form 990.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization

**CATHOLIC SCHOOLS FOUNDATION, INC.**

Employer identification number

**22-2485502**

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use   |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence   |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees     |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain .....

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? .....

**3** Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |  |   |
|--|---|
| <input type="checkbox"/> Compensation committee              | <input type="checkbox"/> Written employment contract                                |
| <input type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment? .....
- b** Participate in or receive payment from a supplemental nonqualified retirement plan? .....
- c** Participate in or receive payment from an equity-based compensation arrangement? .....
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III .....

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III .....

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? .....

|           | Yes | No       |
|-----------|-----|----------|
| <b>1b</b> |     |          |
| <b>2</b>  |     |          |
| <b>4a</b> |     | <b>X</b> |
| <b>4b</b> |     | <b>X</b> |
| <b>4c</b> |     | <b>X</b> |
| <b>5a</b> |     | <b>X</b> |
| <b>5b</b> |     | <b>X</b> |
| <b>6a</b> |     | <b>X</b> |
| <b>6b</b> |     | <b>X</b> |
| <b>7</b>  |     | <b>X</b> |
| <b>8</b>  |     | <b>X</b> |
| <b>9</b>  |     |          |

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2023

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

| (A) Name and Title                                    |      | (B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation |                                     |                                     | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation in column (B) reported as deferred on prior Form 990 |
|---|------|--|-------------------------------------|-------------------------------------|--|-------------------------|---------------------------------|---|
|   |      | (i) Base compensation  | (ii) Bonus & incentive compensation | (iii) Other reportable compensation |  |                         |                                 |   |
| (1) MICHAEL REARDON<br>EXECUTIVE DIRECTOR             | (i)  | 281,241.   | 0.                                  | 0.                                  | 16,500.  | 20,504.                 | 318,245.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (2) MEGAN ADZIMA<br>ALLOCATIONS AND PARTNERSHIPS DIR. | (i)  | 142,913.   | 0.                                  | 0.                                  | 7,903.   | 814.                    | 151,630.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |



**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2023**

Open to Public Inspection

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Name of the organization **CATHOLIC SCHOOLS FOUNDATION, INC.** Employer identification number **22-2485502**

**Part I Types of Property**

|  | (a)<br>Check if applicable | (b)<br>Number of contributions or items contributed | (c)<br>Noncash contribution amounts reported on Form 990, Part VIII, line 1g | (d)<br>Method of determining noncash contribution amounts |
|--|----------------------------|---|--|---|
| 1 Art - Works of art   |                            |   |  |   |
| 2 Art - Historical treasures                                 |                            |   |  |   |
| 3 Art - Fractional interests                                 |                            |   |  |   |
| 4 Books and publications                                     |                            |   |  |   |
| 5 Clothing and household goods                               |                            |   |  |   |
| 6 Cars and other vehicles                                    |                            |   |  |   |
| 7 Boats and planes   |                            |   |  |   |
| 8 Intellectual property                                      |                            |   |  |   |
| 9 Securities - Publicly traded                               | X                          | 18  | 223,263.   | FAIR MARKET VALUE   |
| 10 Securities - Closely held stock                           |                            |   |  |   |
| 11 Securities - Partnership, LLC, or trust interests         |                            |   |  |   |
| 12 Securities - Miscellaneous                                |                            |   |  |   |
| 13 Qualified conservation contribution - Historic structures |                            |   |  |   |
| 14 Qualified conservation contribution - Other               |                            |   |  |   |
| 15 Real estate - Residential                                 |                            |   |  |   |
| 16 Real estate - Commercial                                  |                            |   |  |   |
| 17 Real estate - Other                                       |                            |   |  |   |
| 18 Collectibles  |                            |   |  |   |
| 19 Food inventory  |                            |   |  |   |
| 20 Drugs and medical supplies                                |                            |   |  |   |
| 21 Taxidermy   |                            |   |  |   |
| 22 Historical artifacts                                      |                            |   |  |   |
| 23 Scientific specimens                                      |                            |   |  |   |
| 24 Archeological artifacts                                   |                            |   |  |   |
| 25 Other ( )   |                            |   |  |   |
| 26 Other ( )   |                            |   |  |   |
| 27 Other ( )   |                            |   |  |   |
| 28 Other ( )   |                            |   |  |   |

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement **29**

|   | Yes | No |
|---|-----|----|
| 30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period? |     | X  |
| b If "Yes," describe the arrangement in Part II.  |     |    |
| 31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?   |     | X  |
| 32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?  |     | X  |
| b If "Yes," describe in Part II.  |     |    |
| 33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.   |     |    |

For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) 2023

**Part II**

**Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Multiple horizontal lines for supplemental information.

**SCHEDULE O**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
Attach to Form 990 or Form 990-EZ.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization

CATHOLIC SCHOOLS FOUNDATION, INC.

Employer identification number

22-2485502

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

AN OPPORTUNITY TO GIVE THIER SONS AND DAUGHTERS A QUALITY EDUCATION,  
FOCUSED ON CHRISTIAN VALUES AND CHARACTER FORMATION AT CATHOLIC SCHOOLS  
LOCATED THROUGHOUT THE ARCHDIOCESE OF BOSTON, REGARDLESS OF RACE,  
RELIGION, ETHNICITY OR GENDER.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

ARCHDIOCESE OF BOSTON, REGARDLESS OF RACE, RELIGION, ETHNICITY OR  
GENDER.

FORM 990, PART VI, SECTION A, LINE 2:

JOHN REMONDI AND CHRISTOPHER REMONDI HAVE A FAMILY RELATIONSHIP.

FORM 990, PART VI, SECTION A, LINE 6:

THE FOUNDATION HAS A BOARD OF CORPORATE MEMBERS.

FORM 990, PART VI, SECTION A, LINE 7A:

THE FOUNDATION HAS A BOARD OF CORPORATE MEMBERS CONSISTING OF INDIVIDUALS  
WHO HAVE THE AUTHORITY TO APPROVE OR REJECT THE APPOINTMENT OF TRUSTEES AND  
APPROVE ANY CHANGES TO THE FOUNDATION'S BYLAWS. THESE MEMBERS ARE APPOINTED  
BY THE CHAIRMAN OF THE BOARD MEMBERS (THE ARCHBISHOP OF THE ROMAN CATHOLIC  
ARCHDIOCESE OF BOSTON) AND ARE NOT INVOLVED IN THE GOVERNANCE OF THE  
FOUNDATION.

FORM 990, PART VI, SECTION A, LINE 7B:

THE FOUNDATION HAS A BOARD OF CORPORATE MEMBERS CONSISTING OF INDIVIDUALS

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990) 2023

LHA 332211 11-14-23

|   |  |
|---|--|
| Name of the organization<br>CATHOLIC SCHOOLS FOUNDATION, INC. | Employer identification number<br>22-2485502 |
|---|--|

WHO HAVE THE AUTHORITY TO APPROVE OR REJECT THE APPOINTMENT OF TRUSTEES AND APPROVE ANY CHANGES TO THE FOUNDATIONS BYLAWS. THESE MEMBERS ARE APPOINTED BY THE CHAIRMAN OF THE BOARD OF MEMBERS (THE ARCHBISHOP OF THE ROMAN CATHOLIC ARCHDIOCESE OF BOSTON) AND ARE NOT INVOLVED IN THE GOVERNANCE OF THE FOUNDATION.

FORM 990, PART VI, SECTION B, LINE 11B:

THE FINANCE AND AUDIT COMMITTEE CHAIRS AND TREASURER OF THE BOARD ARE DELEGATED WITH THIS RESPONSIBILITY. HOWEVER, THE FULL BOARD IS MADE AWARE THAT THE FORM 990 IS OPEN FOR THEIR INSPECTION AND PROVIDED AN OPPORTUNITY TO COMMENT.

FORM 990, PART VI, SECTION B, LINE 12C:

IN JULY OF EACH YEAR, EACH MEMBER COMPLETES AN ANNUAL CONFLICT OF INTEREST QUESTIONNAIRE. THE RESULTS ARE REVIEWED BY THE ADMINISTRATIVE ASSISTANT ALONG WITH THE COMMITTEE OF TRUSTEES, AND ANY NEEDED ACTIONS ARE TAKEN AT THAT TIME.

FORM 990, PART VI, SECTION B, LINE 15A:

THE OFFICERS OF THE FOUNDATION'S BOARD REVIEW AND APPROVE THE INITIAL SALARY AND RAISES OF THE EXECUTIVE DIRECTOR AFTER REVIEWING COMPARATIVE SALARY INFORMATION. ALL BOARD MEETINGS ARE DOCUMENTED THROUGH MINUTES.

FORM 990, PART VI, SECTION C, LINE 19:

THE FOUNDATION'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, FINANCIAL STATEMENTS ARE AVAILABLE FOR THE PUBLIC.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:



|   |  |
|---|--|
| Name of the organization<br>CATHOLIC SCHOOLS FOUNDATION, INC. | Employer identification number<br>22-2485502 |
|---|--|

CHANGE IN VALUE OF INTEREST IN RELATED PARTY 388,304.

FORM 990, PART XII, LINE 2C:

THE FOUNDATION HAS AN AUDIT COMMITTEE THAT OVERSEES THE SELECTION OF  
THE AUDITOR AND THE AUDIT OF THE FINANCIAL STATEMENTS.

**SCHEDULE R  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Related Organizations and Unrelated Partnerships**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

**Open to Public Inspection**

Name of the organization **CATHOLIC SCHOOLS FOUNDATION, INC.** Employer identification number **22-2485502**

**Part I Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

| (a)<br>Name, address, and EIN (if applicable)<br>of disregarded entity | (b)<br>Primary activity | (c)<br>Legal domicile (state or<br>foreign country) | (d)<br>Total income | (e)<br>End-of-year assets | (f)<br>Direct controlling<br>entity |
|--|-------------------------|---|---------------------|---------------------------|-------------------------------------|
|  |                         |   |                     |                           |                                     |
|  |                         |   |                     |                           |                                     |
|  |                         |   |                     |                           |                                     |
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|  |                         |   |                     |                           |                                     |
|  |                         |   |                     |                           |                                     |

**Part II Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

| (a)<br>Name, address, and EIN<br>of related organization                     | (b)<br>Primary activity | (c)<br>Legal domicile (state or<br>foreign country) | (d)<br>Exempt Code<br>section | (e)<br>Public charity<br>status (if section<br>501(c)(3)) | (f)<br>Direct controlling<br>entity | (g)<br>Section 512(b)(13)<br>controlled<br>entity? |          |
|--|-------------------------|---|-------------------------------|---|-------------------------------------|--|----------|
|  |                         |   |                               |   |                                     | Yes  | No       |
| ARCHDIOCESE OF BOSTON - 04-2106175<br>66 BROOKS DRIVE<br>BRAINTREE, MA 02184 | CHURCH                  | MASSACHUSETTS                                       | 501(C)(3)                     | LINE 1  |                                     |  | <b>X</b> |
|  |                         |   |                               |   |                                     |  |          |
|  |                         |   |                               |   |                                     |  |          |
|  |                         |   |                               |   |                                     |  |          |
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|  |                         |   |                               |   |                                     |  |          |

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule R (Form 990) 2023

**Part III Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

| (a)<br>Name, address, and EIN<br>of related organization | (b)<br>Primary activity | (c)<br>Legal domicile<br>(state or<br>foreign<br>country) | (d)<br>Direct controlling<br>entity | (e)<br>Predominant income<br>(related, unrelated,<br>excluded from tax under<br>sections 512-514) | (f)<br>Share of total<br>income | (g)<br>Share of<br>end-of-year<br>assets | (h)<br>Disproportionate<br>allocations? |    | (i)<br>Code V-UBI<br>amount in box<br>20 of Schedule<br>K-1 (Form 1065) | (j)<br>General or<br>managing<br>partner? |    | (k)<br>Percentage<br>ownership |
|--|-------------------------|---|-------------------------------------|---|---------------------------------|--|---|----|---|---|----|--------------------------------|
|  |                         |   |                                     |   |                                 |  | Yes                                     | No |   | Yes                                       | No |                                |
|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
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|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
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|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
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|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
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|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

| (a)<br>Name, address, and EIN<br>of related organization | (b)<br>Primary activity | (c)<br>Legal domicile<br>(state or<br>foreign<br>country) | (d)<br>Direct controlling<br>entity | (e)<br>Type of entity<br>(C corp, S corp,<br>or trust) | (f)<br>Share of total<br>income | (g)<br>Share of<br>end-of-year<br>assets | (h)<br>Percentage<br>ownership | (i)<br>Section<br>512(b)(13)<br>controlled<br>entity? |    |
|--|-------------------------|---|-------------------------------------|--|---------------------------------|--|--------------------------------|---|----|
|  |                         |   |                                     |  |                                 |  |                                | Yes   | No |
|  |                         |   |                                     |  |                                 |  |                                |   |    |
|  |                         |   |                                     |  |                                 |  |                                |   |    |
|  |                         |   |                                     |  |                                 |  |                                |   |    |
|  |                         |   |                                     |  |                                 |  |                                |   |    |
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|  |                         |   |                                     |  |                                 |  |                                |   |    |
|  |                         |   |                                     |  |                                 |  |                                |   |    |

**Part V Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

|  | Yes | No |
|--|-----|----|
| <b>a</b> Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity ..... |     | X  |
| <b>b</b> Gift, grant, or capital contribution to related organization(s) .....                                 | X   |    |
| <b>c</b> Gift, grant, or capital contribution from related organization(s) .....                               |     | X  |
| <b>d</b> Loans or loan guarantees to or for related organization(s) .....                                      |     | X  |
| <b>e</b> Loans or loan guarantees by related organization(s) .....   |     | X  |
| <b>f</b> Dividends from related organization(s) .....  |     | X  |
| <b>g</b> Sale of assets to related organization(s) .....   |     | X  |
| <b>h</b> Purchase of assets from related organization(s) .....   |     | X  |
| <b>i</b> Exchange of assets with related organization(s) .....   |     | X  |
| <b>j</b> Lease of facilities, equipment, or other assets to related organization(s) .....                      |     | X  |
| <b>k</b> Lease of facilities, equipment, or other assets from related organization(s) .....                    |     | X  |
| <b>l</b> Performance of services or membership or fundraising solicitations for related organization(s) .....  |     | X  |
| <b>m</b> Performance of services or membership or fundraising solicitations by related organization(s) .....   |     | X  |
| <b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) .....   |     | X  |
| <b>o</b> Sharing of paid employees with related organization(s) .....  |     | X  |
| <b>p</b> Reimbursement paid to related organization(s) for expenses .....                                      | X   |    |
| <b>q</b> Reimbursement paid by related organization(s) for expenses .....                                      |     | X  |
| <b>r</b> Other transfer of cash or property to related organization(s) .....                                   |     | X  |
| <b>s</b> Other transfer of cash or property from related organization(s) .....                                 |     | X  |

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

| (a)<br>Name of related organization | (b)<br>Transaction type (a-s) | (c)<br>Amount involved | (d)<br>Method of determining amount involved |
|-------------------------------------|-------------------------------|------------------------|--|
| (1)                                 |                               |                        |  |
| (2)                                 |                               |                        |  |
| (3)                                 |                               |                        |  |
| (4)                                 |                               |                        |  |
| (5)                                 |                               |                        |  |
| (6)                                 |                               |                        |  |

Part VI Unrelated Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

Table with 11 main columns: (a) Name, address, and EIN of entity; (b) Primary activity; (c) Legal domicile (state or foreign country); (d) Predominant income (related, unrelated, excluded from tax under sections 512-514); (e) Are all partners sec. 501(c)(3) orgs.? (Yes/No); (f) Share of total income; (g) Share of end-of-year assets; (h) Disproportionate allocations? (Yes/No); (i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065); (j) General or managing partner? (Yes/No); (k) Percentage ownership.

**Part VII** **Supplemental Information**

Provide additional information for responses to questions on Schedule R. See instructions.

(Area with multiple horizontal lines for supplemental information)

**Application for Extension of Time To File an Exempt Organization  
Return or Excise Taxes Related to Employee Benefit Plans**

Department of the Treasury  
Internal Revenue Service

File a separate application for each return.  
Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.

**Electronic filing (e-file).** You can electronically file Form 8868 to request up to a 6-month extension of time to file any of the forms listed below except for Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts. An extension request for Form 8870 must be sent to the IRS in a paper format (see instructions). For more details on the electronic filing of Form 8868, visit [www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits](http://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits).

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment instructions.

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Part I - Identification**

|   |  |   |
|---|--|---|
| <b>Type or Print</b><br><br><small>File by the due date for filing your return. See instructions.</small> | Name of exempt organization, employer, or other filer, see instructions.<br><br><b>CATHOLIC SCHOOLS FOUNDATION, INC.</b> | Taxpayer identification number (TIN)<br><br><b>22-2485502</b> |
|   | Number, street, and room or suite no. If a P.O. box, see instructions.<br><b>67 BATTERYMARCH STREET, 6TH FL</b>          |   |
|   | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br><b>BOSTON, MA 02110</b>      |   |

Enter the Return Code for the return that this application is for (file a separate application for each return) **01**

| Application Is For                       | Return Code | Application Is For                | Return Code |
|--|-------------|-----------------------------------|-------------|
| Form 990 or Form 990-EZ                  | 01          | Form 4720 (other than individual) | 09          |
| Form 4720 (individual)                   | 03          | Form 5227                         | 10          |
| Form 990-PF                              | 04          | Form 6069                         | 11          |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05          | Form 8870                         | 12          |
| Form 990-T (trust other than above)      | 06          | Form 5330 (individual)            | 13          |
| Form 990-T (corporation)                 | 07          | Form 5330 (other than individual) | 14          |
| Form 1041-A                              | 08          |                                   |             |

• After you enter your Return Code, complete either Part II or Part III. Part III, including signature, is applicable only for an extension of time to file Form 5330.

• If this application is for an extension of time to file Form 5330, you must enter the following information.

Plan Name \_\_\_\_\_  
 Plan Number \_\_\_\_\_  
 Plan Year Ending (MM/DD/YYYY) \_\_\_\_\_

**Part II - Automatic Extension of Time To File for Exempt Organizations (see instructions)**

The books are in the care of **MICHAEL REARDON**  
**67 BATTERYMARCH STREET, 6TH FL - BOSTON, MA 02110**

Telephone No. **617-778-5981** Fax No. \_\_\_\_\_

- If the organization does not have an office or place of business in the United States, check this box \_\_\_\_\_
- If this is for a Group Return, enter the organization's four-digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and TINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until **MAY 15**, 20 **25**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
 calendar year 20 \_\_\_\_\_ or  
 tax year beginning **JUL 1**, 20 **23**, and ending **JUN 30**, 20 **24**

**2** If the tax year entered in line 1 is for less than 12 months, check reason: Initial return Final return  
 Change in accounting period

|   |           |              |
|---|-----------|--------------|
| <b>3a</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.   | <b>3a</b> | \$ <b>0.</b> |
| <b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. | <b>3b</b> | \$ <b>0.</b> |
| <b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.              | <b>3c</b> | \$ <b>0.</b> |

**For Privacy Act and Paperwork Reduction Act Notice, see instructions.**