

**IRS e-file Signature Authorization  
for a Tax Exempt Entity**

For calendar year 2022, or fiscal year beginning 12/01, 2022, and ending 11/30, 2023.

**Do not send to the IRS. Keep for your records.  
Go to [www.irs.gov/Form8879TE](http://www.irs.gov/Form8879TE) for the latest information.**

**2022**

Department of the Treasury  
Internal Revenue Service  
Name of filer

Katz Amsterdam Foundation

EIN or SSN  
\*\*-\*\*8664

Name and title of officer or person subject to tax Beth Ganz  
Executive Director

**Part I Type of Return and Return Information**

Check the box for the return for which you are using this Form 8879-TE and enter the applicable amount, if any, from the return. Form 8038-CP and Form 5330 filers may enter dollars and cents. For all other forms, enter whole dollars only. If you check the box on line **1a, 2a, 3a, 4a, 5a, 6a, 7a, 8a, 9a, or 10a** below, and the amount on that line for the return being filed with this form was blank, then leave line **1b, 2b, 3b, 4b, 5b, 6b, 7b, 8b, 9b, or 10b**, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than one line in Part I.

<b>1a</b> Form 990 check here	<input type="checkbox"/>	<b>b</b> Total revenue, if any (Form 990, Part VIII, column (A), line 12)	<b>1b</b>	
<b>2a</b> Form 990-EZ check here	<input type="checkbox"/>	<b>b</b> Total revenue, if any (Form 990-EZ, line 9)	<b>2b</b>	
<b>3a</b> Form 1120-POL check here	<input type="checkbox"/>	<b>b</b> Total tax (Form 1120-POL, line 22)	<b>3b</b>	
<b>4a</b> Form 990-PF check here	<input checked="" type="checkbox"/>	<b>b</b> Tax based on investment income (Form 990-PF, Part V, line 5)	<b>4b</b>	<u>2,938</u>
<b>5a</b> Form 8868 check here	<input type="checkbox"/>	<b>b</b> Balance due (Form 8868, line 3c)	<b>5b</b>	
<b>6a</b> Form 990-T check here	<input type="checkbox"/>	<b>b</b> Total tax (Form 990-T, Part III, line 4)	<b>6b</b>	
<b>7a</b> Form 4720 check here	<input type="checkbox"/>	<b>b</b> Total tax (Form 4720, Part III, line 1)	<b>7b</b>	
<b>8a</b> Form 5227 check here	<input type="checkbox"/>	<b>b</b> FMV of assets at end of tax year (Form 5227, Item D)	<b>8b</b>	
<b>9a</b> Form 5330 check here	<input type="checkbox"/>	<b>b</b> Tax due (Form 5330, Part II, line 19)	<b>9b</b>	
<b>10a</b> Form 8038-CP check here	<input type="checkbox"/>	<b>b</b> Amount of credit payment requested (Form 8038-CP, Part III, line 22)	<b>10b</b>	

**Part II Declaration and Signature Authorization of Officer or Person Subject to Tax**

Under penalties of perjury, I declare that  I am an officer of the above entity or  I am a person subject to tax with respect to (name of entity) \_\_\_\_\_, (EIN) \_\_\_\_\_ and that I have examined a copy of the 2022 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the electronic return and, if applicable, the consent to electronic funds withdrawal.

**PIN: check one box only**

I authorize Kundinger, Corder & Montoya, P.C. to enter my PIN 11040 as my signature  
ERO firm name Enter five numbers, but do not enter all zeros

on the tax year 2022 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer or person subject to tax with respect to the entity, I will enter my PIN as my signature on the tax year 2022 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Signature of officer or person subject to tax \_\_\_\_\_ Date 04/02/24

**Part III Certification and Authentication**

**ERO's EFIN/PIN.** Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

\*\*\*\*\*

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2022 electronically filed return indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature Maria Montoya Date 04/03/24

**ERO Must Retain This Form — See Instructions  
Do Not Submit This Form to the IRS Unless Requested To Do So**

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

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/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

Open to Public Inspection

**For calendar year 2022 or tax year beginning 2/01/22, and ending 11/30/23**

Name of foundation <b>Katz Amsterdam Foundation</b>		<b>A Employer identification number</b> **-***8664
Number and street (or P.O. box number if mail is not delivered to street address) <b>2255 Sheridan Boulevard, Unit C</b>	Room/suite	<b>B Telephone number (see instructions)</b> 303-284-4932
City or town, state or province, country, and ZIP or foreign postal code <b>Edgewater CO 80214</b>		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D</b> 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 26,042,867</b>	<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d), must be on cash basis.)	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

<b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	<b>3</b> Interest on savings and temporary cash investments	64,839	64,839	64,839	
	<b>4</b> Dividends and interest from securities	185,792	185,792	185,792	
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10				
	<b>b</b> Gross sales price for all assets on line 6a				
	<b>7</b> Capital gain net income (from Part IV, line 2)		0		
	<b>8</b> Net short-term capital gain			0	
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less: Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)					
<b>12 Total.</b> Add lines 1 through 11	250,631	250,631	250,631		
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc.	302,144			302,144
	<b>14</b> Other employee salaries and wages	439,631			439,631
	<b>15</b> Pension plans, employee benefits	121,344			117,339
	<b>16a</b> Legal fees (attach schedule) <i>See Stmt 1</i>	22,993			8,644
	<b>b</b> Accounting fees (attach schedule) <i>Stmt 2</i>	15,594			15,594
	<b>c</b> Other professional fees (attach schedule) <i>Stmt 3</i>	463,842	39,038	39,038	341,721
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions) <i>Stmt 4</i>	12,646			
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings	84,686			84,686
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (att. sch.) <i>Stmt 5</i>	97,616	200	200	97,416
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	1,560,496	39,238	39,238	1,407,175
	<b>25</b> Contributions, gifts, grants paid	0			0
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	1,560,496	39,238	39,238	1,407,175	
<b>27 Subtract line 26 from line 12:</b>					
<b>a</b> Excess of revenue over expenses and disbursements	-1,309,865				
<b>b Net investment income</b> (if negative, enter -0-)		211,393			
<b>c Adjusted net income</b> (if negative, enter -0-)			211,393		

<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash – non-interest-bearing .....	371,435	62,300	62,300
	2 Savings and temporary cash investments .....	961,550	1,116,890	1,116,890
	3 Accounts receivable .....			
	Less: allowance for doubtful accounts .....			
	4 Pledges receivable .....			
	Less: allowance for doubtful accounts .....			
	5 Grants receivable .....			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) .....			
	7 Other notes and loans receivable (att. schedule) .....			
	Less: allowance for doubtful accounts .....	0		
	8 Inventories for sale or use .....			
	9 Prepaid expenses and deferred charges .....			
	10a Investments – U.S. and state government obligations (attach schedule) .....			
	<b>b</b> Investments – corporate stock (attach schedule) <b>See Stmt 6</b> .....	26,311,568	24,643,750	24,005,659
	<b>c</b> Investments – corporate bonds (attach schedule) .....			
	11 Investments – land, buildings, and equipment: basis .....			
Less: accumulated depreciation (attach sch.) .....				
12 Investments – mortgage loans .....				
13 Investments – other (attach schedule) <b>See Statement 7</b> .....	250,000	860,000	858,018	
14 Land, buildings, and equipment: basis .....				
Less: accumulated depreciation (attach sch.) .....				
15 Other assets (describe .....				
16 <b>Total assets</b> (to be completed by all filers – see the instructions. Also, see page 1, item I) .....	27,894,553	26,682,940	26,042,867	
<b>Liabilities</b>	17 Accounts payable and accrued expenses .....	3,185	101,437	
	18 Grants payable .....			
	19 Deferred revenue .....			
	20 Loans from officers, directors, trustees, and other disqualified persons .....			
	21 Mortgages and other notes payable (attach schedule) .....			
	22 Other liabilities (describe .....			
	23 <b>Total liabilities</b> (add lines 17 through 22) .....	3,185	101,437	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30.</b> <input type="checkbox"/>			
	24 Net assets without donor restrictions .....			
	25 Net assets with donor restrictions .....			
	<b>Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30.</b> <input checked="" type="checkbox"/>			
	26 Capital stock, trust principal, or current funds .....			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund .....			
	28 Retained earnings, accumulated income, endowment, or other funds .....	27,891,368	26,581,503	
29 <b>Total net assets or fund balances</b> (see instructions) .....	27,891,368	26,581,503		
30 <b>Total liabilities and net assets/fund balances</b> (see instructions) .....	27,894,553	26,682,940		

<b>Part III Analysis of Changes in Net Assets or Fund Balances</b>			
1	Total net assets or fund balances at beginning of year – Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) .....	1	27,891,368
2	Enter amount from Part I, line 27a .....	2	-1,309,865
3	Other increases not included in line 2 (itemize) .....	3	
4	Add lines 1, 2, and 3 .....	4	26,581,503
5	Decreases not included in line 2 (itemize) .....	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29 .....	6	26,581,503

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	N/A			
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) <span style="font-size: small;">{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }</span>		2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8 <span style="font-size: small;">{ }</span>		3	

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: <span style="font-size: small;">(attach copy of letter if necessary—see instructions)</span>	1	2,938
b	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) of Part I, line 12, col. (b)	2	0
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	3	2,938
3	Add lines 1 and 2	4	0
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	5	2,938
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	6a	10,032
6	Credits/Payments:	6b	
a	2022 estimated tax payments and 2021 overpayment credited to 2022	6c	
b	Exempt foreign organizations – tax withheld at source	6d	
c	Tax paid with application for extension of time to file (Form 8868)	7	10,032
d	Backup withholding erroneously withheld	8	
7	Total credits and payments. Add lines 6a through 6d	9	
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	10	7,094
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	11	4,154
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>		
11	Enter the amount of line 10 to be: <b>Credited to 2023 estimated tax</b> 2,940 <b>Refunded</b>		

**Part VI-A Statements Regarding Activities**

	Yes	No
<b>1a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? .....		X
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition .....		X
If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? .....		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: <b>(1)</b> On the foundation. \$ _____ <b>(2)</b> On foundation managers. \$ _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ _____		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? .....		X
If "Yes," attach a detailed description of the activities.		
<b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes .....		X
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? .....		X
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? .....	N/A	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? .....		X
If "Yes," attach the statement required by <i>General Instruction T</i> .		
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? .....	X	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV .....	X	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered. See instructions. None .....		
<b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation .....	X	
<b>9</b> Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2022 or the tax year beginning in 2022? See instructions for Part XIII. If "Yes," complete Part XIII .....	X	
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses .....		X
<b>11</b> At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions .....		X
<b>12</b> Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions .....		X
<b>13</b> Did the foundation comply with the public inspection requirements for its annual returns and exemption application? .....	X	
Website address <u>katzamsterdam.org</u>		
<b>14</b> The books are in care of <u>The Foundation</u> Telephone no. <u>303-284-4932</u> <u>2255 Sheridan Boulevard, No. Unit C</u>		
Located at <u>Edgewater</u> CO ZIP+4 <u>80214</u>		
<b>15</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> – check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <b>15</b> _____		
<b>16</b> At any time during calendar year 2022, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? .....		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		

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

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

	Yes	No
<b>1a</b> During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? .....		X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? .....	1a(1)	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? .....	1a(2)	X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? .....	1a(3)	X
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? .....	1a(4)	X
(6) Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) .....	1a(5)	X
<b>b</b> If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions .....	1a(6)	X
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>	1b	X
<b>d</b> Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2022? .....	1d	
N/A		
<b>2</b> Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
<b>a</b> At the end of tax year 2022, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2022? .....	2a	X
If "Yes," list the years 20 ....., 20 ....., 20 ....., 20 .....		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement – see instructions.) .....	2b	
N/A		
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. 20 ....., 20 ....., 20 ....., 20 .....		
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? .....	3a	X
<b>b</b> If "Yes," did it have excess business holdings in 2022 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2022.) .....	3b	
N/A		
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? .....	4a	X
<b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2022? .....	4b	X

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

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Robert Katz 2255 Sheridan Blvd., Unit C Edgewater CO 80214	President & 5.00	0	0	0
Elana Amsterdam 2255 Sheridan Blvd., Unit C Edgewater CO 80214	Secretary 1.00	0	0	0
Beth Ganz 2255 Sheridan Blvd., Unit C Edgewater CO 80214	Executive Di 40.00	302,144	13,156	12,086

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Heather Trish 2255 Sheridan Blvd, Unit C Edgewater CO 80214	Health Netwo 40.00	148,269	14,926	5,931
Jina Freiberg 2255 Sheridan Blvd, Unit C Edgewater CO 80214	Senior Grant 40.00	122,427	12,093	4,897
Grace Loughborough 2255 Sheridan Blvd, Unit C Edgewater CO 80214	Foundation C 40.00	77,000	14,353	2,310
Kahran Myers-Davis 2255 Sheridan Blvd, Unit C Edgewater CO 80214	Civic Eng & 40.00	69,173	2,473	2,767

**Total** number of other employees paid over \$50,000 0

**Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)

**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
FSG, Inc. 179 Lincoln St., 3rd Fl. Boston MA 02111	consulting on m	122,600
Hilltop Public Solutions 1700 Lincoln St Floor 17 Denver CO 80203	Public Relation	75,000
Bold Ventures LLC 910 S. Dexter St. Denver CO 80246	consulting on m	72,839
.....		
.....		
<b>Total</b> number of others receiving over \$50,000 for professional services .....		0

**Part VIII-A Summary of Direct Charitable Activities**

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

	Expenses
1 See Statement 9 .....	1,407,175
2 .....	
3 .....	
4 .....	

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

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

	Amount	
1 N/A .....		
2 .....		
All other program-related investments. See instructions. 3 .....		
<b>Total.</b> Add lines 1 through 3 .....		



<b>Part IX Minimum Investment Return</b> (All domestic foundations must complete this part. Foreign foundations, see instructions.)	
1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	
a Average monthly fair market value of securities .....	1a 23,616,413
b Average of monthly cash balances .....	1b 2,099,719
c Fair market value of all other assets (see instructions) .....	1c 0
d <b>Total</b> (add lines 1a, b, and c) .....	1d 25,716,132
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) .....	1e 0
2 Acquisition indebtedness applicable to line 1 assets .....	2 0
3 Subtract line 2 from line 1d .....	3 25,716,132
4 Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) .....	4 385,742
5 <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 .....	5 25,330,390
6 <b>Minimum investment return.</b> Enter 5% (0.05) of line 5 .....	6 1,266,520

<b>Part X Distributable Amount</b> (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here <input checked="" type="checkbox"/> and do not complete this part.)	
1 Minimum investment return from Part IX, line 6 .....	1
2a Tax on investment income for 2022 from Part V, line 5 .....	2a
b Income tax for 2022. (This does not include the tax from Part V.) .....	2b
c Add lines 2a and 2b .....	2c
3 Distributable amount before adjustments. Subtract line 2c from line 1 .....	3
4 Recoveries of amounts treated as qualifying distributions .....	4
5 Add lines 3 and 4 .....	5
6 Deduction from distributable amount (see instructions) .....	6
7 <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1 .....	7

<b>Part XI Qualifying Distributions</b> (see instructions)	
1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	
a Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26 .....	1a 1,407,175
b Program-related investments – total from Part VIII-B .....	1b
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes .....	2
3 Amounts set aside for specific charitable projects that satisfy the:	
a Suitability test (prior IRS approval required) .....	3a
b Cash distribution test (attach the required schedule) .....	3b
4 <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4 .....	4 1,407,175

**Part XII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
<b>1</b> Distributable amount for 2022 from Part X, line 7 .....				
<b>2</b> Undistributed income, if any, as of the end of 2022:				
<b>a</b> Enter amount for 2021 only .....				
<b>b</b> Total for prior years: 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2022:				
<b>a</b> From 2017 .....				
<b>b</b> From 2018 .....				
<b>c</b> From 2019 .....				
<b>d</b> From 2020 .....				
<b>e</b> From 2021 .....				
<b>f Total</b> of lines 3a through e .....				
<b>4</b> Qualifying distributions for 2022 from Part XI, line 4: \$ _____ 0				
<b>a</b> Applied to 2021, but not more than line 2a .....				
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions) .....				
<b>c</b> Treated as distributions out of corpus (Election required – see instructions) .....				
<b>d</b> Applied to 2022 distributable amount .....				
<b>e</b> Remaining amount distributed out of corpus .....				
<b>5</b> Excess distributions carryover applied to 2022 (If an amount appears in column (d), the same amount must be shown in column (a).) .....				
<b>6 Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 .....				
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b .....				
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed .....				
<b>d</b> Subtract line 6c from line 6b. Taxable amount – see instructions .....				
<b>e</b> Undistributed income for 2021. Subtract line 4a from line 2a. Taxable amount – see instructions .....				
<b>f</b> Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023 .....				
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions) .....				
<b>8</b> Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions) .....				
<b>9 Excess distributions carryover to 2023.</b> Subtract lines 7 and 8 from line 6a .....				
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2018 .....				
<b>b</b> Excess from 2019 .....				
<b>c</b> Excess from 2020 .....				
<b>d</b> Excess from 2021 .....				
<b>e</b> Excess from 2022 .....				

**Part XIII Private Operating Foundations** (see instructions and Part VI-A, question 9)

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2022, enter the date of the ruling 11/06/18

**b** Check box to indicate whether the foundation is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

	Tax year				(e) Total
	(a) 2022	(b) 2021	(c) 2020	(d) 2019	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed	211,393	227,823	109,558	131,955	680,729
<b>b</b> 85% (0.85) of line 2a	179,684	193,650	93,124	112,162	578,620
<b>c</b> Qualifying distributions from Part XI, line 4, for each year listed	1,407,175	1,571,959	771,199	617,705	4,368,038
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities		350,000			350,000
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	1,407,175	1,221,959	771,199	617,705	4,018,038
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test – enter:					
<b>(1)</b> Value of all assets					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test – enter 2/3 of minimum investment return shown in Part IX, line 6, for each year listed	844,347	867,970	401,301	304,875	2,418,493
<b>c</b> "Support" alternative test – enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XIV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year – see instructions.)**

**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)  
N/A

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.  
N/A

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

**a** The name, address, and telephone number or email address of the person to whom applications should be addressed:  
N/A

**b** The form in which applications should be submitted and information and materials they should include:  
N/A

**c** Any submission deadlines:  
N/A

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:  
N/A

**Part XIV Supplementary Information** *(continued)*

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<p><b>a</b> <i>Paid during the year</i> N/A</p>				
<p><b>Total</b> .....</p>			<b>3a</b>	
<p><b>b</b> <i>Approved for future payment</i> N/A</p>				
<p><b>Total</b> .....</p>			<b>3b</b>	



**Part XVI Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

**1** Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

	Yes	No
<b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of:		
<b>(1)</b> Cash .....		X
<b>(2)</b> Other assets .....		X
<b>b</b> Other transactions:		
<b>(1)</b> Sales of assets to a noncharitable exempt organization .....		X
<b>(2)</b> Purchases of assets from a noncharitable exempt organization .....		X
<b>(3)</b> Rental of facilities, equipment, or other assets .....		X
<b>(4)</b> Reimbursement arrangements .....		X
<b>(5)</b> Loans or loan guarantees .....		X
<b>(6)</b> Performance of services or membership or fundraising solicitations .....		X
<b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees .....		X
<b>d</b> If the answer to any of the above is "Yes," complete the following schedule. Column <b>(b)</b> should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column <b>(d)</b> the value of the goods, other assets, or services received.		

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
N/A			

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?  Yes  No

**b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

<b>Sign Here</b>	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	Signature of officer or trustee	Date	Title
			Executive Director

May the IRS discuss this return with the preparer shown below? See instructions. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed
	Maria Montoya	Maria Montoya	04/03/24	
	Firm's name	Firm's address	PTIN	Firm's EIN
	Kundinger, Corder & Montoya, P.C.	475 Lincoln Street, Suite 200 Denver, CO 80203	*****	303-534-5953

## Federal Statements

### Statement 1 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Bryan Cave	\$ 22,993	\$	\$	\$ 8,644
Total	\$ 22,993	\$ 0	\$ 0	\$ 8,644

### Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Kundinger, Corder & Montoya, P.C	\$ 3,900	\$	\$	\$ 3,900
One Seven Advisors	11,694			11,694
Total	\$ 15,594	\$ 0	\$ 0	\$ 15,594

### Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Bold Ventures LLC	\$ 72,839	\$	\$	\$ 72,839
FSG, Inc.	198,600			122,600
Crestone Capital	39,038	39,038	39,038	
GroundFloor Media	19,618			12,535
DataViz	150			150
Government Performance Solutions	12,896			12,896
Aspara Projects LLC	45,701			45,701
Hilltop Public Solutions	75,000			75,000
Total	\$ 463,842	\$ 39,038	\$ 39,038	\$ 341,721

## Federal Statements

### Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
2022 Form 990-PF taxes	\$ 2,614	\$	\$	\$
Estimated tax payments for 2023	10,032			
Total	\$ 12,646	\$ 0	\$ 0	\$ 0

### Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Expenses	\$	\$	\$	\$
Website design	3,588			3,588
Software license	5,749			5,749
Dues and subscriptions	15,140			15,140
Payroll services	2,066			2,066
Bank charges & fees	200	200	200	
Shipping/postage	679			679
Benefits provider fees	2,742			2,742
Other business expense	1,554			1,554
Employee recruiting	54,628			54,628
Internet & telephone expense	5,318			5,318
Annual filing fees	3,062			3,062
Insurance	1,705			1,705
Advertising	30			30
Fixed Asset Computers	1,155			1,155
Total	\$ 97,616	\$ 200	\$ 200	\$ 97,416

### Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Vanguard Star Fund	\$ 26,311,568	\$ 24,643,750	Cost	\$ 24,005,659
Total	\$ 26,311,568	\$ 24,643,750		\$ 24,005,659



### Federal Statements

#### Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
CLC Brave Health 1, LLC	\$ 250,000	\$ 250,000	Cost	\$ 248,018
Clayful		250,000	Cost	250,000
MAPS PBC		250,000	Cost	250,000
SPV Seven Starling		110,000	Cost	110,000
Total	<u>\$ 250,000</u>	<u>\$ 860,000</u>		<u>\$ 858,018</u>

**Federal Statements**

**Statement 8 - Form 990-PF, Part VI-B, Line 5d - Expenditure responsibilities (Section 53.4945-5(d))**

Description

Grantee's Name  
 Fair Fight Action, Inc.  
 1270 Caroline Street NE  
 Suite D120-430  
 Atlanta, GA 30307

Grant Amount	Date of Grant	Amount Expended	Verification Date
\$200,000	5/26/2022	\$200,000	7/14/2023

Purpose of Grant  
 General support for civic engagement.  
 Dates of Reports by Grantee  
 7/14/2023  
 Any Diversion by Grantee  
 No  
 Results of Verification  
 7/14/2023; 100% of the grant has been expended

Grantee's Name  
 Planned Parenthood Alliance Advocates, Serving AK HI ID in KY and WA  
 842 S 7th Street  
 Louisville, KY 40203

Grant Amount	Date of Grant	Amount Expended	Verification Date
\$150,000	9/22/2022	\$150,000	10/31/2023

Purpose of Grant  
 Support for Protect Kentucky Access's Educational Efforts  
 Dates of Reports by Grantee  
 10/31/2023  
 Any Diversion by Grantee  
 No  
 Results of Verification  
 10/31/2023; 100% of the grant has been expended

**Statement 9 - Form 990-PF, Part VIII-A, Line 1 - Summary of Direct Charitable Activities**

Description

During 2023, the Foundation continued its work to bring mountain resort communities together for shared learning around common challenges in building effective mental and behavioral health systems that serve the needs of community members. A special focus of this multi-community network this year was working with non-profit leaders to develop behavioral health peer network programs, to expand the number of people who can offer help needed in each community.

The Foundation hosted our annual Convening of over 70 behavioral health professionals from 10 different mountain communities in May, during which we discussed the specific needs of communities of color in mountain towns and shared best practices for community-based programs and solutions. We also added three new communities to our network in 2023 and re-focused our efforts on mountain resort communities in the Western U.S.

Katz Amsterdam also solidified our focus in two areas this

**Statement 9 - Form 990-PF, Part VIII-A, Line 1 - Summary of Direct Charitable Activities  
(continued)**

Description

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year: civic engagement for communities of color and reproductive justice. We hired a new program director to help oversee these program areas who is working to build relationships with non-profit partners across the country. The Foundation analyzed several states to determine where we could be most helpful as a partner promoting civic engagement for BIPOC communities, and have decided to focus on Arizona, Nevada and North Carolina.

The Foundation helped the Katz Amsterdam Charitable Trust facilitate four rounds of grant funding this year including critical projects in each mountain community, programs to provide youth access to winter sports, support for organizations working to promote reproductive justice and non-profits that work to enhance the civic engagement of communities of color.