

Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No. 1545-0047

2023Department of the Treasury
Internal Revenue ServiceDo not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information.

Open to Public Inspection

For calendar year 2023 or tax year beginning , and ending

Name of foundation Yesod Foundation Inc.		A Employer identification number 26-4606574
Number and street (or P.O. box number if mail is not delivered to street address) 116 Brigham Hill Road		B Telephone number (see instructions) 508-459-8000
City or town, state or province, country, and ZIP or foreign postal code North Grafton MA 01536		C If exemption application is pending, check here <input type="checkbox"/>
G 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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H 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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 317,708	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	6,849	6,849		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	4,421			
	b Gross sales price for all assets on line 6a 96,606				
	7 Capital gain net income (from Part IV, line 2)		4,421		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	11,270	11,270	0	
	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) Stmt 1	2,500	1,250		1,250
	c Other professional fees (attach schedule) Stmt 2	5,046	5,046		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att. sch.) Stmt 3	240			240
	24 Total operating and administrative expenses. Add lines 13 through 23	7,786	6,296	0	1,490
	25 Contributions, gifts, grants paid	33,660			33,660
	26 Total expenses and disbursements. Add lines 24 and 25	41,446	6,296	0	35,150
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-30,176			
	b Net investment income (if negative, enter -0-)		4,974		
	c Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2023)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash — non-interest-bearing	1,700	299	300
	2 Savings and temporary cash investments	13,302	9,676	9,676
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule)			
	Less: allowance for doubtful accounts	0		
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule)			
	c 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) See Statement 4	308,806	281,245	307,732	
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation (attach sch.)				
15 Other assets (describe)				
16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	323,808	291,220	317,708	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. <input type="checkbox"/>			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. <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	323,808	291,220	
	29 Total net assets or fund balances (see instructions)	323,808	291,220	
	30 Total liabilities and net assets/fund balances (see instructions)	323,808	291,220	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year — Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	323,808
2 Enter amount from Part I, line 27a	2	-30,176
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	293,632
5 Decreases not included in line 2 (itemize) See Statement 5	5	2,412
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 29	6	291,220

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 See Worksheet				
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.			(i) 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) If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	4,421	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8		3	1,650	

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary — see instructions)		1	69
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0
3 Add lines 1 and 2		3	69
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	69
6 Credits/Payments:			
a 2023 estimated tax payments and 2022 overpayment credited to 2023	6a	356	
b Exempt foreign organizations — tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		7	356
8 Enter any penalty for underpayment of estimated tax. Check <input type="checkbox"/> if Form 2220 is attached		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	287
11 Enter the amount of line 10 to be: Credited to 2024 estimated tax 287 Refunded		11	

Part VI-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
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 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ (2) On foundation managers \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		X
If "Yes," attach a detailed description of the activities.		
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 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>		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. MA		
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	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the tax year beginning in 2023? See instructions for Part XIII. If "Yes," complete Part XIII		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address www.yesod.org		
14 The books are in care of Fletcher Tilton, PC		
Located at 100 Front Street		
Telephone no. 508-459-8000		
Located at Worcester		
MA		
ZIP+4 01608-1779		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here		<input type="checkbox"/>
and enter the amount of tax-exempt interest received or accrued during the year	15	
16 At any time during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?		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
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?		X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?		X
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?		X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?		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)?		X
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)		X
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	N/A	
c Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
d Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2023?	N/A	
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2023, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2023? If "Yes," list the years 20 , 20 , 20 , 20		X
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement — see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 20 , 20 , 20 , 20		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?		X
b If "Yes," did it have excess business holdings in 2023 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2023.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2023?		X

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

	Yes	No
5a During the year did the foundation pay or incur any amount to:		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)	X
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)	X
(3) Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)	X
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d) (4)(A)? See instructions	5a(4)	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?	5a(5)	X
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b	N/A
c Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
d If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	5d	N/A
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a	X
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	6b	X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a	X
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	7b	N/A
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	8	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
Kenneth C. Crater 116 Brigham Hill Road North Grafton MA 01536	President, D 5.00	0	0	0
Margaret A. Ferraro 116 Brigham Hill Road North Grafton MA 01536	V.P., Direct 5.00	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

0**Part VIII-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 N/A	
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	

Total. Add lines 1 through 3

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	315,410
b	Average of monthly cash balances	1b	9,888
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	325,298
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	325,298
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	4,879
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	320,419
6	Minimum investment return. Enter 5% (0.05) of line 5	6	16,021

Part X Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1	Minimum investment return from Part IX, line 6	1	16,021
2a	Tax on investment income for 2022 from Part V, line 5	2a	69
b	Income tax for 2022. (This does not include the tax from Part V.)	2b	
c	Add lines 2a and 2b	2c	69
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	15,952
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	15,952
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	15,952

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a	35,150
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4	4	35,150

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				15,952
2 Undistributed income, if any, as of the end of 2023:				
a Enter amount for 2022 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2023:				
a From 2018	56,017			
b From 2019	18,458			
c From 2020	20,373			
d From 2021	19,041			
e From 2022	22,256			
f Total of lines 3a through e	136,145			
4 Qualifying distributions for 2023 from Part XI, line 4: \$ 35,150				
a Applied to 2022, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2023 distributable amount				15,952
e Remaining amount distributed out of corpus	19,198			
5 Excess distributions carryover applied to 2023 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	155,343			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount — see instructions				
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount — see instructions				
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions)				
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)	56,017			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	99,326			
10 Analysis of line 9:				
a Excess from 2019	18,458			
b Excess from 2020	20,373			
c Excess from 2021	19,041			
d Excess from 2022	22,256			
e Excess from 2023	19,198			

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 2023, enter the date of the ruling _____

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	Prior 3 years			(e) Total
	(a) 2023	(b) 2022	(c) 2021	(d) 2020	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed _____					
b 85% (0.85) of line 2a _____					
c Qualifying distributions from Part XI, line 4, for each year listed _____					
d Amounts included in line 2c not used directly for active conduct of exempt activities _____					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c _____					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test — enter:					
(1) Value of all assets _____					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i) _____					
b "Endowment" alternative test — enter 2/3 of minimum investment return shown in Part IX, line 6, for each year listed _____					
c "Support" alternative test — enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) _____					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) _____					
(3) Largest amount of support from an exempt organization _____					
(4) Gross investment income _____					

Part 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:
Kenneth C. Crater 508-459-8000
116 Brigham Hill Road North Grafton MA 01536

b The form in which applications should be submitted and information and materials they should include:
See Statement 6

c Any submission deadlines:
None.

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
See Statement 7

Part XIV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	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
a Paid during the year				
Brigham Hill Community Barn 37 Wheeler Road North Grafton MA 01536	None	PC	Maintenance, Utilities, Taxes	5,060
Community Harvest Project 37 Wheeler Road North Grafton MA 01536	None	PC	General Operating Funds	25,000
Greater Worcester Comm. Foundation 370 Main Street #650 Worcester MA 01608	None	PC	Civic Leadership Fund	1,000
Town of Grafton 30 Providence Road Grafton MA 01519	None	PC	Grafton Celebrates the Holidays	600
Worcester County Food Bank 474 Boston Turnpike Shrewsbury MA 01545	None	PC	General Operating Funds	1,000
Grafton Arts 116 Brigham Hill Road North Grafton MA 01536	None	PC	General Operating Funds	1,000
Total			3a	33,660
b Approved for future payment N/A				
Total			3b	

Capital Gains and Losses for Tax on Investment Income

Form **990-PF**

2023

For calendar year 2023, or tax year beginning , and ending

Name

Employer Identification Number

Yesod Foundation Inc.

26-4606574

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
(1) Blackrock Event Driven Equity Fund	D	02/16/23	03/29/23
(2) Blackrock Event Driven Equity Fund	D	02/16/23	09/27/23
(3) Credit Suisse Commodity-Return	D	07/15/22	03/29/23
(4) Credit Suisse Commodity-Return	D	02/16/23	09/27/23
(5) Credit Suisse Commodity-Return	D	02/16/23	10/19/23
(6) Diamon Hill Large Cap Fund	D	02/16/23	09/27/23
(7) Diamon Hill Large Cap Fund	D	02/16/23	09/27/23
(8) Eaton Vance Glb Macro	D	07/31/23	09/27/23
(9) Ishares Core US Aggregate Bond ETF	D	05/31/22	03/29/23
(10) Ishares Russell Mid-Cap ETF	D	09/30/22	02/15/23
(11) Ishares Russell Mid-Cap ETF	D	09/30/22	09/27/23
(12) Ishares Russell Mid-Cap ETF	D	03/29/23	09/27/23
(13) Ishares Russell 2000 Index	D	03/29/23	09/27/23
(14) Ishares 10-20 Year Treasury Bond ETF	D	07/31/23	09/27/23
(15) Ishares 10-20 Year Treasury Bond ETF	D	07/31/23	09/27/23

(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)
(1) 631		641	-10
(2) 1,974		1,974	
(3) 226		262	-36
(4) 429		439	-10
(5) 71		72	-1
(6) 2,914		3,001	-87
(7) 30		30	
(8) 827		837	-10
(9) 99		103	-4
(10) 962		817	145
(11) 2,141		1,949	192
(12) 483		479	4
(13) 177		175	2
(14) 99		108	-9
(15) 198		198	

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(1)			-10
(2)			
(3)			-36
(4)			-10
(5)			-1
(6)			-87
(7)			
(8)			-10
(9)			-4
(10)			145
(11)			192
(12)			4
(13)			2
(14)			-9
(15)			

Form 990-PF		Capital Gains and Losses for Tax on Investment Income		2023
Name		For calendar year 2023, or tax year beginning		and ending
Yesod Foundation Inc.		Employer Identification Number		26-4606574
(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
(1)	Ishares Edge MSCI Min Vol EAFE ETF	D	09/30/22	02/15/23
(2)	Ishares Edge MSCI Min Vol EAFE ETF	D	09/30/22	03/29/23
(3)	Ishares Edge MSCI Min Vol EAFE ETF	D	09/30/22	09/27/23
(4)	Ishares Edge MSCI Min Vol USA ETF	D	09/30/22	09/27/23
(5)	Brandywine Global	D	02/16/23	03/29/23
(6)	Brandywine Global	D	02/16/23	07/31/23
(7)	Loomise Sayles Growth Fund	D	02/16/23	03/29/23
(8)	Loomise Sayles Growth Fund	D	02/16/23	07/31/23
(9)	Loomise Sayles Growth Fund	D	02/16/23	09/27/23
(10)	MFS Mid Cap Value Fund	D	03/29/23	09/27/23
(11)	Neuberger Berman Long Short Fund	D	02/16/23	03/29/23
(12)	Neuberger Berman Long Short Fund	D	02/16/23	09/27/23
(13)	Neuberger Berman Long Short Fund	D	02/16/23	10/19/23
(14)	Abbey Capital Futures Strategy Fund	D	02/16/23	03/29/23
(15)	Abbey Capital Futures Strategy Fund	D	02/16/23	09/27/23
(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)
(1)	1,252		1,091	161
(2)	470		402	68
(3)	522		460	62
(4)	1,020		940	80
(5)	348		342	6
(6)	1,681		1,636	45
(7)	945		919	26
(8)	3,264		2,600	664
(9)	956		834	122
(10)	331		323	8
(11)	828		814	14
(12)	1,676		1,587	89
(13)	84		79	5
(14)	47		50	-3
(15)	841		828	13
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(1)			161	
(2)			68	
(3)			62	
(4)			80	
(5)			6	
(6)			45	
(7)			26	
(8)			664	
(9)			122	
(10)			8	
(11)			14	
(12)			89	
(13)			5	
(14)			-3	
(15)			13	

Form 990-PF	Capital Gains and Losses for Tax on Investment Income	2023
For calendar year 2023, or tax year beginning , and ending		

Name Yesod Foundation Inc.	Employer Identification Number 26-4606574
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(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
(1) Abbey Capital Futures Strategy Fund	D	02/16/23	10/19/23
(2) Vanguard S&P 500 ETF	D	02/15/23	03/29/23
(3) Vanguard S&P 500 ETF	D	02/15/23	09/27/23
(4) Wells Fargo Special Small Cap Value	D	03/29/23	09/27/23
(5) Blackrock Mid-Cap Growth	D	07/24/20	02/15/23
(6) Blackrock Mid-Cap Growth	D	07/24/20	03/29/23
(7) Blackrock Mid-Cap Growth	D	07/24/20	09/27/23
(8) Blackrock Mid-Cap Growth	D	07/24/20	10/19/23
(9) Conestoga Small Cap Fund	D	11/23/18	02/15/23
(10) Conestoga Small Cap Fund	D	11/23/18	03/29/23
(11) Conestoga Small Cap Fund	D	11/23/18	09/27/23
(12) Credit Suisse Commodity-Return	D	07/15/22	09/27/23
(13) Harding Loevner Funds Inc Intl	D	11/23/18	02/15/23
(14) Harding Loevner Funds Inc Intl	D	11/23/18	03/29/23
(15) Harding Loevner Funds Inc Intl	D	11/23/18	10/19/23

(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)
(1) 84		83	1
(2) 368		379	-11
(3) 3,148		3,034	114
(4) 227		217	10
(5) 3,806		3,820	-14
(6) 1		1	
(7) 667		694	-27
(8) 99		104	-5
(9) 2,629		2,025	604
(10) 160		129	31
(11) 396		318	78
(12) 583		673	-90
(13) 1,322		1,055	267
(14) 49		40	9
(15) 188		162	26

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) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
(1)			1
(2)			-11
(3)			114
(4)			10
(5)			-14
(6)			
(7)			-27
(8)			-5
(9)			604
(10)			31
(11)			78
(12)			-90
(13)			267
(14)			9
(15)			26

Form 990-PF	Capital Gains and Losses for Tax on Investment Income	2023
For calendar year 2023, or tax year beginning _____, and ending _____		

Name Yesod Foundation Inc.	Employer Identification Number 26-4606574
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(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
(1) Oakmark Intl Fd Cl	D	08/31/20	09/27/23
(2) Oakmark Intl Fd Cl	D	11/23/18	02/15/23
(3) Oakmark Intl Fd Cl	D	08/31/20	02/15/23
(4) Oakmark Intl Fd Cl	D	08/31/20	03/29/23
(5) Hartford Schroders Emerging	D	01/29/21	09/27/23
(6) Hartford Schroders Emerging	D	01/29/21	10/19/23
(7) Ishares S&P 100 ETF	D	11/23/18	03/29/23
(8) Ishares S&P 100 ETF	D	11/23/18	09/27/23
(9) Ishares S&P 100 ETF	D	11/23/18	10/19/23
(10) Ishares Core US Aggregate Bond ETF	D	06/06/19	02/15/23
(11) Ishares Core US Aggregate Bond ETF	D	03/05/21	02/15/23
(12) Ishares Core US Aggregate Bond ETF	D	06/06/19	03/29/23
(13) Ishares Core US Aggregate Bond ETF	D	05/31/22	07/31/23
(14) Ishares Core US Aggregate Bond ETF	D	05/31/22	09/27/23
(15) Ishares Core US Aggregate Bond ETF	D	07/15/22	09/27/23

(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)
(1) 274		231	43
(2) 381		335	46
(3) 1,602		1,282	320
(4) 58		48	10
(5) 641		928	-287
(6) 131		190	-59
(7) 549		352	197
(8) 2,401		1,406	995
(9) 203		117	86
(10) 9,416		10,582	-1,166
(11) 785		914	-129
(12) 1,288		1,433	-145
(13) 1,076		1,138	-62
(14) 1,790		1,790	
(15) 94		94	

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) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
(1)			43
(2)			46
(3)			320
(4)			10
(5)			-287
(6)			-59
(7)			197
(8)			995
(9)			86
(10)			-1,166
(11)			-129
(12)			-145
(13)			-62
(14)			
(15)			

Capital Gains and Losses for Tax on Investment Income

Form **990-PF**

2023

For calendar year 2023, or tax year beginning , and ending

Name

Employer Identification Number

Yesod Foundation Inc.

26-4606574

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
(1) Ishares Core US Aggregate Bond ETF	D	07/15/22	09/27/23
(2) Ishares Tr Russell 2000 Index Fd	D	08/31/17	02/15/23
(3) Ishares Tr Russell 2000 Index Fd	D	08/31/17	09/27/23
(4) Ishares Edge MSCI Min Vol USA ETF	D	09/30/22	10/19/23
(5) John Hancock Seaport	D	01/29/21	09/27/23
(6) John Hancock Seaport	D	01/29/21	10/19/23
(7) John Hancock Seaport Long/Short Fund	D	01/29/21	03/29/23
(8) Brandywine Global	D	11/23/18	07/31/23
(9) Loomise Sayles Growth Fund	D	11/23/18	09/27/23
(10) Loomise Sayles Growth Fund	D	11/23/18	10/19/23
(11) MFS Mid Cap Value Fund	D	11/23/18	09/27/23
(12) PIMCO Internation Bond Fund US Dolla	D	07/24/20	03/29/23
(13) PIMCO Internation Bond Fund US Dolla	D	08/14/20	03/29/23
(14) PIMCO Internation Bond Fund US Dolla	D	10/08/21	03/29/23
(15) PIMCO Internation Bond Fund US Dolla	D	11/23/18	09/27/23

(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)
(1) 848		921	-73
(2) 2,124		1,537	587
(3) 177		140	37
(4) 73		67	6
(5) 1,459		1,621	-162
(6) 146		162	-16
(7) 281		321	-40
(8) 3,916		3,753	163
(9) 481		351	130
(10) 302		219	83
(11) 777		626	151
(12) 93		106	-13
(13) 211		239	-28
(14) 141		160	-19
(15) 412		471	-59

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(1)			-73
(2)			587
(3)			37
(4)			6
(5)			-162
(6)			-16
(7)			-40
(8)			163
(9)			130
(10)			83
(11)			151
(12)			-13
(13)			-28
(14)			-19
(15)			-59

Form 990-PF		Capital Gains and Losses for Tax on Investment Income		2023
		For calendar year 2023, or tax year beginning _____, and ending _____		
Name Yesod Foundation Inc.			Employer Identification Number 26-4606574	
(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
(1)	PIMCO Internation Bond Fund US Dolla	D	08/14/20	09/27/23
(2)	PIMCO Internation Bond Fund US Dolla	D	11/23/18	10/19/23
(3)	PIMCO Dynamic Bond Fund	D	04/24/19	09/27/23
(4)	PIMCO Dynamic Bond Fund	D	04/24/19	09/27/23
(5)	PGIM High Yield Fund	D	08/29/19	02/15/23
(6)	PGIM High Yield Fund	D	04/24/20	02/15/23
(7)	PGIM High Yield Fund	D	03/05/21	02/15/23
(8)	Vanguard FTSE Developed Markets ETF	D	11/23/18	02/15/23
(9)	Vanguard FTSE Developed Markets ETF	D	11/23/18	03/29/23
(10)	Vanguard FTSE Developed Markets ETF	D	11/23/18	09/27/23
(11)	Vanguard Total International Bond ET	D	07/24/20	03/29/23
(12)	Vanguard Total International Bond ET	D	07/24/20	09/27/23
(13)	Vanguard Total International Bond ET	D	08/14/20	09/27/23
(14)	Vanguard Total International Bond ET	D	09/17/21	09/27/23
(15)	Vanguard Total International Bond ET	D	06/06/19	10/19/23

(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)
(1) 133		152	-19
(2) 1,412		1,632	-220
(3) 399		455	-56
(4) 48		48	
(5) 3,090		3,688	-598
(6) 3,258		3,754	-496
(7) 16		19	-3
(8) 2,440		2,115	325
(9) 133		118	15
(10) 872		784	88
(11) 488		580	-92
(12) 288		348	-60
(13) 48		57	-9
(14) 144		172	-28
(15) 757		907	-150

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(1)			-19
(2)			-220
(3)			-56
(4)			
(5)			-598
(6)			-496
(7)			-3
(8)			325
(9)			15
(10)			88
(11)			-92
(12)			-60
(13)			-9
(14)			-28
(15)			-150

Capital Gains and Losses for Tax on Investment Income

Form **990-PF**

2023

For calendar year 2023, or tax year beginning , and ending

Name

Employer Identification Number

Yesod Foundation Inc.

26-4606574

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
(1) Vanguard Total International Bond ET	D	08/14/20	10/19/23
(2) Vanguard Total International Bond ET	D	03/05/21	10/19/23
(3) Vanguard FTSE Emergine Markets ETF	D	01/29/21	09/27/23
(4) Vanguard FTSE Emergine Markets ETF	D	01/29/21	09/27/23
(5) Vanguard FTSE Emergine Markets ETF	D	08/04/21	09/27/23
(6) Wells Fargo Special Small Cap Value	D	03/14/17	02/15/23
(7) Wells Fargo Special Small Cap Value	D	03/14/17	09/27/23
(8) Western Asset Core Bd Port	D	07/24/20	02/15/23
(9) Western Asset Core Bd Port	D	07/24/20	03/29/23
(10) Western Asset Core Bd Port	D	07/24/20	09/27/23
(11) Bank of America - CG Dist.			
(12)			
(13)			
(14)			
(15)			

(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)
(1) 331		401	-70
(2) 331		400	-69
(3) 117		155	-38
(4) 39		39	
(5) 117		156	-39
(6) 2,892		2,443	449
(7) 450		400	50
(8) 3,374		4,315	-941
(9) 450		577	-127
(10) 212		212	
(11) 3,384			3,384
(12)			
(13)			
(14)			
(15)			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(1)			-70
(2)			-69
(3)			-38
(4)			
(5)			-39
(6)			449
(7)			50
(8)			-941
(9)			-127
(10)			
(11)			3,384
(12)			
(13)			
(14)			
(15)			

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Trust & Accounting Fees	\$ 2,500	\$ 1,250	\$	\$ 1,250
Total	\$ 2,500	\$ 1,250	\$ 0	\$ 1,250

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Investment Fees	\$ 5,046	\$ 5,046	\$	\$
Total	\$ 5,046	\$ 5,046	\$ 0	\$ 0

Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Federal Tax Payment	\$	\$	\$	\$
Foreign Tax Paid	\$ 0	\$ 0	\$ 0	\$ 0
Total	\$ 0	\$ 0	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Expenses				
MA Annual Filing	200			200
Miscellaneous Exp.	5			5
MA PC Filing Fee	35			35
Total	240	0	0	240

Statement 4 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Bank of America Equities	169,220	148,109	Cost	187,998
Bank of America Fixed Income	76,489	53,720	Cost	50,074
Bank of America Mutual Funds	21,447	21,652	Cost	10,925
Bank of America Hedge Funds	41,650	57,764	Cost	58,735
Total	308,806	281,245		307,732

26-4606574

Federal Statements

FYE: 12/31/2023

Statement 5 - Form 990-PF, Part III, Line 5 - Other Decreases

<u>Description</u>	<u>Amount</u>
Reversal from Prior Year	\$ 2,412
Total	\$ 2,412

Statement 6 - Form 990-PF, Part XIV, Line 2b - Application Format and Required Contents

<u>Description</u>
Applications should be in letter form. Include proof of tax-exempt status.

Form 990-PF, Part XIV, Line 2c - Submission Deadlines

<u>Description</u>
None.

Statement 7 - Form 990-PF, Part XIV, Line 2d - Award Restrictions or Limitations

<u>Description</u>
To provide funding and in-kind support to organizations engaged in hunger relief, land conservation and other charitable and religious endeavors. Contributions are made primarily in the Grafton, MA area.

Form **990-W****Estimated Tax on Unrelated Business Taxable
Income for Tax-Exempt Organizations**

OMB No. 1545-0047

(Worksheet)

Department of the Treasury
Internal Revenue Service

► Go to www.irs.gov/Form990W for instructions and the latest information.
► Keep for your records. Do not send to the Internal Revenue Service.

2022

1	Unrelated business taxable income expected in the tax year	1	
2	Tax on the amount on line 1. See instructions for tax computation	2	
3	Alternative minimum tax for trusts. See instructions	3	
4	Total. Add lines 2 and 3	4	
5	Estimated tax credits. See instructions	5	
6	Subtract line 5 from line 4	6	
7	Other taxes. See instructions	7	
8	Total. Add lines 6 and 7	8	
9	Credit for federal tax paid on fuels. See instructions	9	
10a	Subtract line 9 from line 8. Note: If less than \$500, the organization is not required to make estimated tax payments. Private foundations, see instructions	10a	69
b	Enter the tax shown on the 2021 return. See instructions. Caution: If zero or the tax year was for less than 12 months, skip this line and enter the amount from line 10a on line 10c	10b	69
c	2022 Estimated Tax. Enter the smaller of line 10a or line 10b. If the organization is required to skip line 10b, enter the amount from line 10a on line 10c	10c	69

	(a)	(b)	(c)	(d)
11 Installment due dates. See instructions	11	05/15/24	06/17/24	09/16/24
12 Required installments. Enter 25% of line 10c in columns (a) through (d). But see instructions if the organization uses the annualized income installment method, the adjusted seasonal installment method, or is a "large organization."	12	100		
13 2021 Overpayment. See instructions	13	100		
14 Payment due (Subtract line 13 from line 12)	14			

For Paperwork Reduction Act Notice, see instructions.

Form **990-W** (2022)

Form 990-PF	Underdistribution and Excess Distributions for Part XII For calendar year 2023, or tax year beginning _____, ending _____	2023
Name Yesod Foundation Inc.		Employer Identification Number 26-4606574

Undistributed Income Carryovers

Form 990-PF, Part XII

Tax Year	Prior Undistributed Income			Current Year Decreases	Next Year Carryover	
	Nontaxable or Previously Taxed	Taxable in 2023	Total per Year		Nontaxable or Previously Taxed	Taxable in 2024
Years prior						
20 19						
20 20						
20 21						
2022						
2023			15,952	15,952		
Total Carryover to Next Year						0

* Carryover amount includes 4942(a) amounts

Excess Distribution Carryovers

Form 990-PF, Part XII

Preceding Tax Year Excess Distributions	Current Year	Next Year
	Decreases	Carryover
2018 56,017	56,017	
2019 18,458		18,458
2020 20,373		20,373
2021 19,041		19,041
2022 22,256		22,256
Current Year Excess Distribution Generated (2023)		19,198
Total Carryover to Next Year		99,326

Use the 2Yr Report for more recent historical information

Name

Yesod Foundation Inc.

Taxpayer Identification Number

26-4606574

	2019		2020		2021	
	Revenue and expenses per books	Net investment income	Revenue and expenses per books	Net investment income	Revenue and expenses per books	Net investment income
1. Contributions, gifts, grants, and similar amounts received						
2. Interest on savings and temporary cash investments						
3. Dividends and interest from securities	7,758	7,758	5,521	5,521	11,167	11,167
4. Gross rents						
5. Net gain or (loss) from sale of assets	26,822		21,974		26,228	
6. Capital gain net income		26,822		21,974		26,228
7. Gross profit or (loss)						
8. Other income	1,300		246		141	
9. Total. Add lines 1 through 8	35,880	34,580	27,741	27,495	37,536	37,395
10. Compensation of officers, directors, trustees, etc.						
11. Other employee salaries and wages						
12. Pension plans, employee benefits						
13. Professional fees	8,801	7,391	7,617	6,817	6,022	6,022
14. Interest						
15. Taxes	931	144	833	92	144	144
16. Depreciation and depletion						
17. Occupancy						
18. Other expenses	203		374		372	84
19. Contributions, gifts, grants paid	36,281		37,622		39,592	
20. Total expenses and disbursements. Add lines 10 through 19	46,216	7,535	46,446	6,909	46,130	6,250
21. Net income (if negative investment activity, enter -0-)	-10,336	27,045	-18,705	20,586	-8,594	31,145
22. Excise Tax		541		286		433
23. Section 511 Tax						
24. Subtitle A income tax						
25. Total Taxes		541		286		433
26. Estimates and overpayments credited		400		600		314
27. Foreign tax withheld						
28. Other Payments						
29. Total payments and credits		400		600		314
30. Balance due / (Overpayment)		141		0		119
31. Overpayment credited to next year				314		
32. Penalty						
33. Net due / (Refund)		141		0		119
34. Total assets	363,300		344,595		327,833	
35. Total liabilities	0		0		0	
36. Net assets	363,300		344,595		327,833	

Taxable Dividends from Securities

Description	Amount	Unrelated Business	Exclusion Code	Postal Code	US Obs (\$ or %)
Bank of America - Dividends	\$ 6,591		14		
Bank of America - Interest	258		14		
Total	\$ 6,849				

