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TIN: 34-6598971

Form **990-PF**Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

- ▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047

2023Open to Public
Inspection

For calendar year 2023, or tax year beginning 01-01-2023 , and ending 12-31-2023

Name of foundation BURTON D MORGAN FOUNDATION INC		A Employer identification number 34-6598971
Number and street (or P.O. box number if mail is not delivered to street address) 22 AURORA ST	Room/suite	B Telephone number (see instructions) (330) 655-1660
City or town, state or province, country, and ZIP or foreign postal code HUDSON, OH 44236		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>186,139,622</u>	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	0			
	2 Check ☒				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	4,518,142	2,853,146		
	5a Gross rents	100	100		
	b Net rental income or (loss)	100			
	6a Net gain or (loss) from sale of assets not on line 10	7,682,756			
	b Gross sales price for all assets on line 6a	34,021,215			
	7 Capital gain net income (from Part IV, line 2)		9,000,091		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	309,342	573,968			
12 Total. Add lines 1 through 11	12,510,340	12,427,305			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	753,311	137,493		615,818
	14 Other employee salaries and wages	547,387	71,762		475,625
	15 Pension plans, employee benefits	178,271	23,371		156,221
	16a Legal fees (attach schedule)	4,580	600		3,259
	b Accounting fees (attach schedule)	52,527	6,886		45,954
	c Other professional fees (attach schedule)	1,202,960	414,736		91,352
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	175,000	0		0
	19 Depreciation (attach schedule) and depletion	182,666	23,948		
	20 Occupancy	26,315	3,450		23,701
	21 Travel, conferences, and meetings	126,555	16,048		108,130
	22 Printing and publications	14,050	1,842		15,441

Part I	23	Other expenses (attach schedule)	1,108,710	20,123	1,101,008
	24	Total operating and administrative expenses. Add lines 13 through 23	4,432,338	726,261	2,697,369
	25	Contributions, gifts, grants paid	6,443,137		7,338,937
	26	Total expenses and disbursements. Add lines 24 and 25	10,875,475	726,261	10,036,306
	27	Subtract line 26 from line 12:			
	a	Excess of revenue over expenses and disbursements	1,634,865		
	b	Net investment income (if negative, enter -0-)		11,701,044	
	c	Adjusted net income (if negative, enter -0-)			

For Paperwork Reduction Act Notice, see instructions.

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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		108,775	73,480	73,480
	2	Savings and temporary cash investments		3,122,102	5,396,398	5,396,398
	3	Accounts receivable ▶ <u>227,658</u>				
		Less: allowance for doubtful accounts ▶ _____		168,384	227,658	227,658
	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 ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		46,912	46,305	46,305
	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)		50,973,911	47,323,884	47,323,884
	c	Investments—corporate bonds (attach schedule)		7,421,607	5,051,691	5,051,691
	11	Investments—land, buildings, and equipment: basis ▶ _____				
Liabilities		Less: accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)		108,441,997	125,238,620	125,238,620
	14	Land, buildings, and equipment: basis ▶ <u>5,200,207</u>				
		Less: accumulated depreciation (attach schedule) ▶ <u>2,528,679</u>		2,663,751	2,671,528	2,671,528
	15	Other assets (describe ▶ _____)		227,667	110,058	110,058
	16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		173,175,106	186,139,622	186,139,622
	17	Accounts payable and accrued expenses		83,697	48,623	
	18	Grants payable		1,859,950	964,150	
	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 ▶ _____)		227,667	110,058	
	23	Total liabilities (add lines 17 through 22)		2,171,314	1,122,831	
Assets or Fund Balances		Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29 and 30.				
	24	Net assets without donor restrictions		168,549,817	182,828,097	
	25	Net assets with donor restrictions		2,453,975	2,188,694	
		Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.				
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				

Net Assets	28	Retained earnings, accumulated income, endowment, or other funds		
	29	Total net assets or fund balances (see instructions)	171,003,792	185,016,791
	30	Total liabilities and net assets/fund balances (see instructions)	173,175,106	186,139,622

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	171,003,792
2	Enter amount from Part I, line 27a	2	1,634,865
3	Other increases not included in line 2 (itemize)	3	12,378,134
4	Add lines 1, 2, and 3	4	185,016,791
5	Decreases not included in line 2 (itemize)	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	185,016,791

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PUBLICLY TRADED SECURITIES			
b H.I.G. WHITEHORSE OFFSHORE DIRECT LENDING FUND	P		
c H.I.G. WHITEHORSE LUXEMBOURG DIRECT LENDING FUND - 2020	P		
d CAPITAL GAINS FROM PASSTHROUGHS	P		
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 33,716,807		25,008,012	8,708,795
b 5,706		5,706	0
c 7,406		7,406	0
d 291,296			291,296
e			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a			8,708,795
b			0
c			0
d			291,296
e			

2	Capital gain net income or (net capital loss)	2	9,000,091
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)	1	162,645
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	162,645
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	162,645
6	Credits/Payments:		
a	2023 estimated tax payments and 2022 overpayment credited to 2023	6a	223,554
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	47,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	270,554
			0

8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	9	
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	107,909
11	Enter the amount of line 10 to be: Credited to 2024 estimated tax ▶ 107,909 Refunded ▶	11	0

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Part VI-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	Yes	No
1a			No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. <i>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.</i>		No
1b			No
c	Did the foundation file Form 1120-POL for this year?	1c	No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 0 (2) On foundation managers. ▶ \$ 0		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2	No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  By language in the governing instrument, or  By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	7	Yes
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ OH		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> . 	8b	No
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>	9	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," attach schedule. See instructions.</i>	11	No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i>	12	No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ WWW.BDMORGANFDN.ORG	13	Yes
14	The books are in care of ▶ DENISE M GRIGGS Telephone no. ▶ (330) 655-1660		
	Located at ▶ 22 AURORA ST HUDSON OH ZIP+4 ▶ 44236		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15		
16	At any time during calendar year 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? See the instructions for exceptions and filing requirements for FinCEN Form 114. <i>If "Yes," enter the name of the foreign country</i> ▶	16	No

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Page **5****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?	1a(1)	No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)	No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)	No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)	No
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions.	1b	No
c Organizations relying on a current notice regarding disaster assistance check here. ☐		
d Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2023?	1d	No
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?	2a	No
If "Yes," list the years ► 20____, 20____, 20____, 20____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	No
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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2023.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2023?	4b	No

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Page **6****Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

	Yes	No
5a During the year did the foundation pay or incur any amount to:		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?.	5a(1)	No
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)	No
(3) Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)	No
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	5a(4)	No
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)	No
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.	5b	
c Organizations relying on a current notice regarding disaster assistance check ☐		
d If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	5d	
If "Yes," attach the statement required by Regulations section 53.4945-5(d).		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a	No
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b	No

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

b If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

7a		No
7b		
8		No

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DANIEL J HAMPU 22 AURORA ST HUDSON, OH 44236	PRESIDENT/CEO 40.00	335,500	37,258	0
DENISE M GRIGGS 22 AURORA ST HUDSON, OH 44236	VICE PRESIDENT/CFO 40.00	232,667	42,886	0
RICHARD N SEAMAN 22 AURORA ST HUDSON, OH 44236	CHAIRPERSON 2.00	15,000	0	0
PATRICK T FINLEY 22 AURORA ST HUDSON, OH 44236	TREASURER 2.00	15,000	0	0
KEITH A BROWN 22 AURORA ST HUDSON, OH 44236	TRUSTEE 2.00	15,000	0	0
J MICHAEL HOCHSCHWENDER 22 AURORA ST HUDSON, OH 44236	TRUSTEE 2.00	15,000	0	0
MARK D ROBESON 22 AURORA ST HUDSON, OH 44236	TRUSTEE 2.00	15,000	0	0
EDDIE TAYLOR JR 22 AURORA ST HUDSON, OH 44236	TRUSTEE 2.00	15,000	0	0
JENNIFER L PESHINA 22 AURORA ST HUDSON, OH 44236	TRUSTEE 2.00	15,000	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANGELA K EVANS 22 AURORA ST HUDSON, OH 44236	SR. PROGRAM OFFICER 40.00	122,250	20,256	0
EMILY M BEAN 22 AURORA ST HUDSON, OH 44236	DIR. OF YOUTH ENTREP 40.00	106,129	22,846	0
GINA M DOTSON 22 AURORA ST HUDSON, OH 44236	GRANTS & COMMUNICATI 40.00	93,875	21,058	0
MICHELLE B MARCUS 22 AURORA ST HUDSON, OH 44236	PROGRAM OFFICER 40.00	84,183	19,121	0
JEANNE M SILCOX 22 AURORA ST HUDSON, OH 44236	EXECUTIVE ASSISTANT 40.00	72,264	10,293	0
Total number of other employees paid over \$50,000.				1

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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
HIG CAPITAL	ALTERNATIVE INVEST FUND MANAGEMENT	640,014

1450 BRICKELL AVE 31ST FLOOR MIAMI, FL 44313		
ENTREPRENEURSHIP POLICY ADVISORS	CONSULTING	410,000
475J ARSENAL COURT WATERTOWN, MA 02472		
WONDERKILN LLC	PLATFORM DEVELOPMENT	185,413
526 S MAIN ST SUITE 9X AKRON, OH 44311		
CLEARSTEAD	INVESTMENT CONSULTANT	105,788
1100 SUPERIOR AVE EAST SUITE 700 CLEVELAND, OH 44114		
BROADLEAF PARTNERS LLC	INVESTMENT MANAGER	94,598
9 AURORA STREET SUITE 5 HUDSON, OH 94598		
Total number of others receiving over \$50,000 for professional services. ▶		11

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 THE FOUNDATION SUPPORTS AND ASSISTS WITH STAFFING SCALERATOR NEO. THE SIX-MONTH EDUCATIONAL PROGRAM PROVIDES PRACTICAL SALES AND MARKETING, ORGANIZATIONAL DEVELOPMENT AND ENTREPRENEURS ON THE 3 CS OF GROWTH - CUSTOMERS, CAPACITY, AND CASH. THE COHORT LEARNING EXPERIENCE IS LED BY A FACULTY OF ENTREPRENEURSHIP EDUCATION EXPERTS INCLUDING MBA'S, PH.D.'S, AND OTHER DISTINGUISHED ACADEMIANS AND PRACTITIONERS.	494,251
2 MORGAN FOUNDATION SUPPORTS ENTREPRENEURSHIP EDUCATION FOR YOUTH THROUGH A MARKET-BASED PLATFORM ON WHICH EDUCATORS DECIDE WHAT IS FUNDED USING A POINTS-BASED SYSTEM. THROUGH YIPPEE EXCHANGE, HIGH-QUALITY PRODUCTS ARE AVAILABLE ON THE SITE; EDUCATORS USE POINTS TO PURCHASE THEM; AND PROVIDERS ARE PAID BASED ON WHAT EDUCATORS BUY. THE MARKETPLACE BUILDS STUDENT SKILLS AND EXPOSES STUDENTS TO ENTREPRENEURS IN THEIR COMMUNITIES.	422,460
3 THE FOUNDATION HAS PARTNERED WITH THE EDWARD LOWE FOUNDATION TO PROVIDE EDUCATIONAL PROGRAMMING TO ACCELERATE SUCCESS FOR SECOND-STAGE BUSINESSES. THE PROGRAMS FOCUS ON PEER LEARNING, LEADERSHIP EDUCATION, AND STRATEGIC INFORMATION. THE TWO FOUNDATIONS SHARE A MISSION TO CHAMPION FREE ENTERPRISE AND ENTREPRENEURSHIP	26,500
4 THE FOUNDATION PROVIDES TECHNICAL ASSISTANCE TO FIVE HIGHER EDUCATION INSTITUTIONS WITH IMPLEMENTING AND MAINTAINING THEIR NEOLAUNCHNET PROGRAMS. NEOLAUNCHNET IS A REGIONAL SIGNATURE INITIATIVE THAT SEEKS TO INSPIRE A CULTURE OF INNOVATION ON COLLEGE AND UNIVERSITY CAMPUSES, BUILDING UPON THE UNIQUE ASSETS AND STRENGTHS OF EACH SCHOOL, AND SPARKING THE ENTREPRENEURIAL MINDSET IN ENTERPRISING STUDENTS. THE FOUNDATION STAFF FACILITATES AND COORDINATES THE PROGRAM IN NORTHEAST OHIO.	19,378

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	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	0

Form **990-PF** (2023)**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	121,768,834
b Average of monthly cash balances.	1b	10,408,791
c Fair market value of all other assets (see instructions).	1c	42,687,330
d Total (add lines 1a, b, and c).	1d	174,864,955
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	174,864,955
4 Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	2,622,974

5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	172,241,981
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	8,612,099

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign

Part X organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part IX, line 6.	1	8,612,099
2a	Tax on investment income for 2022 from Part V, line 5.	2a	162,645
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	162,645
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	8,449,454
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	8,449,454
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	8,449,454

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	10,036,306
b	Program-related investments—total from Part VIII-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	178,553
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	10,214,859

Form **990-PF** (2023)

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				8,449,454
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			844,834	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018.				
b From 2019.				
c From 2020.				
d From 2021.				
e From 2022.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2023 from Part XI, line 4: ☐ \$ 10,214,859				
a Applied to 2022, but not more than line 2a			844,834	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2023 distributable amount.				8,449,454
e Remaining amount distributed out of corpus	920,571			
5 Excess distributions carryover applied to 2023. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	920,571			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.				0
f Undistributed income for 2023. Subtract				

6 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)	0			
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions) . . .	0			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	920,571			
10 Analysis of line 9:				
a Excess from 2019.				
b Excess from 2020.				
c Excess from 2021.				
d Excess from 2022.				
e Excess from 2023.	920,571			

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Page **10****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 organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2023	(b) 2022	(c) 2021	(d) 2020	
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).)
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

FOUNDATION ONLY ACCEPTS ONLINE APPL

FOUNDATION ONLY ACCEPTS ONLINE APPL
WWW.BDMORGANFDN.ORG/APPLY
HUDSON, OH 44236
(330) 655-1660

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

SEE FORMAT AT WWW.BDMORGANFDN.ORG/APPLY

c Any submission deadlines:

SEE DEADLINES AT WWW.BDMORGANFDN.ORG/DEADLINES

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

SEE RESTRICTIONS AT WWW.BDMORGANFDN.ORG/GRANT-FOCUS

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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)				
a Paid during the year				
ACCESS INC 230 W MARKET ST AKRON, OH 44303		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	20,000
ACCESS INC 230 W MARKET ST AKRON, OH 44303		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
ADAPTIVE SPORTS PROGRAM OF OHIO 2148 EAGLE PASS SUITE C WOOSTER, OH 44691		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
AKRON ZOOLOGICAL PARK 500 EDGEWOOD AVE AKRON, OH 44307		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	10,000
AKRON-CANTON REGIONAL FOODBANK 350 OPPORTUNITY PKWY AKRON, OH 44307		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	5,000
ALLEGHENY COLLEGE 520 N MAIN ST MEADVILLE, PA 16335		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
ANIMAL WELFARE LEAGUE OF TRUMBULL COUNTY PO BOX 66 VIENNA, OH 44473		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500
ARTISTS ARCHIVES OF THE WESTERN RESERVE 1834 E 123RD STREET CLEVELAND, OH 44106		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	1,000
ASHLAND UNIVERSITY 401 COLLEGE AVE ASHLAND, OH 44805		PC	FOR CONTENT CREATION AND FOR ENTREPRENEURSHIP AND FREE ENTERPRISE PROGRAMMING IN 2023-24	145,000
ASHLAND UNIVERSITY 401 COLLEGE AVE ASHLAND, OH 44805		PC	TO SUPPORT MICROGRANTS IN 2023	19,000
ASSOCIATION OF FUNDRAISING PROFESSIONALS NORTHEAST OHIO		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500

CHAPTER PO BOX 1286 BATH, OH 44210				
AVIVA (SARASOTA-MANATEE JEWISH HOUSING COUNCIL) 1951 N HONORE AVENUE SARASOTA, FL 34235		PC	FOR THE FUND FOR CAREGIVERS, IN MEMORY OF IRENE D. SEAMAN	1,000
BALDWIN WALLACE UNIVERSITY 275 EASTLAND RD BEREA, OH 44017		PC	TO SUPPORT NEOLAUNCHNET PROGRAMMING IN 2023-24	140,000
BE A BETTER ME FOUNDATION 901 TUSCARAWAS STREET E CANTON, OH 44707		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	15,000
BOUNCE INNOVATION HUB 526 S MAIN ST AKRON, OH 44311		PC	TO SUSTAIN EXISTING PROGRAMMING AND TO PURCHASE EQUIPMENT / OUTFIT CLASSROOMS	544,000
BRITE 125 W MARKET ST WARREN, OH 44481		PC	TO SUPPORT ACTIVITIES OF BRITENETWORK IN 2023-24	100,000
CAMPAIGN FOR HUMAN RIGHTS INC 137 MONTAGUE STREET BROOKLYN, NY 11201		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	15,000
CANDID 32 OLD SLIP 24TH FL NEW YORK, NY 10005		PC	FOR OPERATING SUPPORT OF THE CANDID MIDWEST REGION	7,500
CASE WESTERN RESERVE UNIVERSITY 10900 EUCLID AVE CLEVELAND, OH 44106		PC	TO SUPPORT MICROGRANTS IN 2023	30,000
CASE WESTERN RESERVE UNIVERSITY 10900 EUCLID AVE CLEVELAND, OH 44106		PC	TO SUPPORT NEOLAUNCHNET PROGRAMMING IN 2023-24	130,000
CASE-BARLOW BICENTENNIAL FARM 1931 BARLOW RD HUDSON, OH 44236		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	1,500
CENTER FOR CHRISTIAN VIRTUE PO BOX 2945 COLUMBUS, OH 43216		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	2,000
CHAIR-ITY INC 200 PUBLIC SQUARE 3270 CLEVELAND, OH 44114		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	12,500
CHILDREN'S ADVOCACY CENTER OF PORTAGE COUNTY 6847 N CHESTNUT ST RAVENNA, OH 44266		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
CHIPPEWA LAKE WATER SKI SHOW TEAM PO BOX 217 CHIPPEWA LAKE, OH 44215		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	15,000
CINCINNATI PLAYHOUSE IN THE PARK 962 MT ADAMS CIRCLE CINCINNATI, OH 45202		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	2,000
CINCINNATI SCHOLARSHIP FOUNDATION		PC	FOR THE ODELL OWENS SCHOLARSHIP FUND	2,000

324 E 4TH STREET CINCINNATI, OH 45202				
CINCINNATI YOUTH COLLABORATIVE 301 OAK STREET CINCINNATI, OH 45219		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	2,000
CITY OF HUDSON 1140 TEREX RD STE 400 HUDSON, OH 44236		GOV	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	1,200
CLEVELAND STATE UNIVERSITY FOUNDATION 2121 EUCLID AVE CLEVELAND, OH 441152214		PC	TO SUPPORT ENTREPRENEURSHIP PROGRAMMING IN 2023-24	70,000
CLEVELAND STATE UNIVERSITY FOUNDATION 2121 EUCLID AVE CLEVELAND, OH 441152214		PC	TO SUPPORT MICROGRANTS IN 2023	20,000
COLLEGE NOW GREATER CLEVELAND INC 1500 W 3RD ST CLEVELAND, OH 441142321		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	5,000
COLLEGE NOW GREATER CLEVELAND INC 1500 W 3RD ST CLEVELAND, OH 441142321		PC	FOR THE JIMMY MALONE SCHOLARSHIP PROGRAM	5,000
COMMUNITY INITIATIVES 1000 BROADWAY STE 480 OAKLAND, CA 94607		PC	FOR OPERATING SUPPORT FOR ENTREPRENEURSHIP FUNDERS NETWORK	20,000
CONSERVANCY FOR CUYAHOGA VALLEY NATIONAL PARK 1403 WEST HINES HILL ROAD PENINSULA, OH 44264		PC	FOR THE RIVER ACCESS IMPROVEMENT PROJECT	25,000
COUNCIL OF FRIENDS GROUPS OF AKRON-SUMMIT COUNTY PUBLIC LIBRARY 430 LISBON DR TALLMADGE, OH 44278		PC	FOR ENTREPRENEURSHIP PROGRAMMING	10,000
CUYAHOGA COMMUNITY COLLEGE FOUNDATION 700 CARNEGIE AVENUE CLEVELAND, OH 44115		PC	FOR THE WILLIAM H. GARY WORKFORCE TRAINING SCHOLARSHIP FUND	2,000
CUYAHOGA COMMUNITY COLLEGE FOUNDATION 700 CARNEGIE AVENUE CLEVELAND, OH 44115		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	1,000
CUYAHOGA COUNTY PUBLIC LIBRARY 2111 SNOW ROAD CLEVELAND, OH 44134		PC	TO SUPPORT AN INNOVATION CENTER AT CCPL-SOLON BRANCH	100,000
DESTINATION HUDSON 27 E MAIN ST HUDSON, OH 44236		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	6,000
DO IT FOR JAMES FOUNDATION PO BOX 2128 STREETSBORO, OH 44241		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500
DOMESTIC VIOLENCE PROJECT INC PO BOX 9459 CANTON, OH 44711		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	15,000

DOWNTOWN AKRON PARTNERSHIP 103 S HIGH ST 4TH FL AKRON, OH 44308		PC	TO SUPPORT THE START DOWNTOWN PROGRAM	20,000
DOWNTOWN ARTS THEATER PO BOX 1717 116 EAST SOUTH STREET WOOSTER, OH 44691		PC	FOR THE LYRIC THEATER RENOVATION PROJECT IN 2022-2023	50,000
ECONOMIC GROWTH FOUNDATION 1240 HURON ROAD E CLEVELAND, OH 44115		PC	TO SUPPORT THE LAUNCH OF MAP LAB IN 2023-25	130,000
EFFECTIVE LEADERSHIP ACADEMY 4480 RICHMOND RD WARRENSVILLE HEIGHTS, OH 44128		PC	FOR THE 2023-24 CHAMBER LEADERSHIP ACADEMY	3,000
EMMANUEL CHRISTIAN ACADEMY 350 S PORTAGE PATH AKRON, OH 44320		PC	FOR ENTREPRENEURSHIP PROGRAMMING	20,000
ENTREPRENEURS ORGANIZATION OF CLEVELAND 6253 N APPLECROSS ROAD CLEVELAND, OH 44143		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	3,000
FAMICOS FOUNDATION INC 1325 ANSEL ROAD CLEVELAND, OH 44106		PC	FOR A YOUTH EMPLOYMENT PROGRAM	5,000
FARE-CLE COMMUNITY FUND INC 33055 SHADOWBROOK OLON, OH 44139		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	300
FIRST CONGREGATIONAL CHURCH OF HUDSON 47 AURORA ST HUDSON, OH 44236		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	10,000
FIRST EVANGELICAL CONGREGATIONAL CHURCH 369 EAST WOODSDALE AVENUE AKRON, OH 44301		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500
FOOD BANK CONTRA COSTA AND SOLANO 4010 NELSON AVENUE CONCORD, CA 94520		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	50,000
FORCE - FACING OUR RISK OF CANCER EMPOWERED 16057 TAMPA PALMS BLVD W TAMPA, FL 33647		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	250
FRIENDS OF THE WOOSTER SYMPHONY ORCHESTRA 240 E BEVERLY ROAD WOOSTER, OH 44691		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	10,000
FUND FOR OUR ECONOMIC FUTURE OF NORTHEAST OHIO 4415 EUCLID AVE STE 202 CLEVELAND, OH 44103		PC	FOR OPERATING SUPPORT AND JOB CREATION AND/OR ENTREPRENEURIAL SUPPORT ACTIVITIES	230,000
FUSION CHURCH 220 INDUSTRIAL DRIVE MANSFIELD, OH 44904		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	1,000
GENDERSPHERE		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	700

3583 INGLESIDE ROAD BEACHWOOD, OH 44122				
GENDERSPHERE 3583 INGLESIDE ROAD BEACHWOOD, OH 44122		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	12,500
GIRLS ON THE RUN EAST CENTRAL OHIO 237 TUSCARWAS STREET W CANTON, OH 44702		PC	FOR SCHOLARSHIPS FOR GIRLS TO PARTICIPATE IN THE PROGRAM	10,000
GRACE HOUSE AKRON INC 475 NORTH HOWARD STREET AKRON, OH 44310		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
GREATER AKRON CHAMBER FOUNDATION 388 S MAIN STREET AKRON, OH 44311		PC	TO SUPPORT THE BUSINESS RESOURCE NAVIGATOR AND THE POLYMER CONNECTIVITY CLUSTER	41,752
GREATER AKRON MUSICAL ASSOCIATION 92 N MAIN STREET AKRON, OH 44308		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
GREATER CINCINNATI TELEVISION EDUCATIONAL FOUNDATION 1223 CENTRAL PARKWAY CINCINNATI, OH 45214		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	2,000
GREATER CLEVELAND SPORTS COMMISSION 334 EUCLID AVE CLEVELAND, OH 44114		PC	TO SUPPORT PAID INTERNSHIPS AT GREATER CLEVELAND SPORTS COMMISSION FOR STUDENTS OF COLOR IN 2024	10,000
GREATER TOLEDO COMMUNITY FOUNDATION 300 MADISON AVENUE SUITE 1300 TOLEDO, OH 43604		PC	FOR PAMS FUND, WHICH WAS ESTABLISHED IN MEMORY OF PAM HOWELL-BEACH	500
GROWTH OPPORTUNITY PARTNERS 6001 EUCLID AVENUE SUITE 100 CLEVELAND, OH 44103		PC	TO CREATE A FUND THAT AIMS TO FOSTER EQUITABLE ECONOMIC GROWTH IN UNDERSERVED OHIO COMMUNITIES BY OFFERING CREDIT ENHANCEMENT THROUGH CASH COLLATERAL LOAN GUARANTEES	500,000
HAWAII COMMUNITY FOUNDATION 827 FORT STREET MALL HONOLULU, HI 96813		PC	FOR THE MAUI STRONG FUND	20,000
HEALTHNETWORK FOUNDATION 3350 LANDER ROAD SUITE 225 CLEVELAND, OH 44124		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	10,000
HEALTHY HEARTS AND PAWS PROJECT 384 COLLAR PRICE RD SE BROOKFIELD, OH 44403		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500
HEBREW FREE LOAN ASSOCIATION 1422 EUCLID AVENUE SUITE 400 CLEVELAND, OH 44115		PC	FOR BUSINESS LENDING IN NORTHEAST OHIO	150,000
HIRAM COLLEGE PO BOX 67 HIRAM, OH 442340067		PC	TO SUPPORT CENTER FOR INTEGRATED ENTREPRENEURSHIP ACTIVITIES	43,000
HUDSON CITY SCHOOL DISTRICT 76 N HAYDEN PKWY HUDSON, OH 44236		GOV	TO SUPPORT HUDSON HIGH SCHOOL CLUBS	15,000

HUDSON, OH 44236				
HUDSON CITY SCHOOL DISTRICT 76 N HAYDEN PKWY HUDSON, OH 44236		GOV	TO SUPPORT HUDSON MIDDLE SCHOOL CLUBS	10,000
HUDSON COMMUNITY FIRST 49 E MAIN ST HUDSON, OH 44236		PC	FOR THE CAREER PANEL AND INTERN FOR A DAY PROGRAM	6,000
HUDSON COMMUNITY FOUNDATION 49 E MAIN ST HUDSON, OH 44236		PC	FOR THE HUDSON BANDSTAND FUND SUMMER CONCERT SERIES	2,500
HUDSON COMMUNITY FOUNDATION 49 E MAIN ST HUDSON, OH 44236		PC	FOR THE HUDSON DEI ALLIANCE	2,500
HUDSON COMMUNITY FOUNDATION 49 E MAIN ST HUDSON, OH 44236		PC	FOR THE VINCENT WILLIAM BARAN CHARITABLE FUND	6,000
HUDSON COMMUNITY SERVICE ASSOCIATION PO BOX 1472 HUDSON, OH 44236		PC	FOR THE HELPING HANDS ASSISTANCE FUND	8,000
HUDSON FARMERS MARKET PO BOX 1073 HUDSON, OH 44236		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	5,000
HUDSON HERITAGE ASSOCIATION PO BOX 2218 HUDSON, OH 44236		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	250
HUDSON JOB SEARCH 7666 HUDSON PARK DR HUDSON, OH 44236		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	7,500
HUDSON LIBRARY AND HISTORICAL SOCIETY 96 LIBRARY ST HUDSON, OH 44236		PC	TO SUPPORT PROGRAMMING FOR THE BURTON D. MORGAN ENTREPRENEURSHIP CENTER INCLUDING GLOBAL ENTREPRENEURSHIP WEEK PROGRAMMING IN HUDSON	60,000
HUDSON MONTESSORI SCHOOL 7545 DARROW RD HUDSON, OH 44236		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	5,000
HUDSON ROTARY FOUNDATION INC PO BOX 323 HUDSON, OH 44236		PC	FOR THE SCHOLARSHIP FUND	1,000
HUDSON-LANDSBERG SISTER CITY PO BOX 1382 HUDSON, OH 442360882		PC	FOR THE CHRISTKINDLMARKT EVENT IN 2023	5,000
IDEASTREAM PUBLIC MEDIA 1375 EUCLID AVE CLEVELAND, OH 44115		PC	TO SUPPORT REGIONAL BUSINESS STORYTELLING EFFORTS	70,000
INSPIRING MINDS PO BOX 8512 WARR, OH 44484		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	1,000
IRAN HUMAN RIGHTS DOCUMENTATION CENTER 129 CHURCH STREET SUITE 423 NEW HAVEN CT 06510		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	15,000

NEW HAVEN, CT 06510		PC	TO SUPPORT MICROGRANTS IN 2023	20,000
JOHN CARROLL UNIVERSITY 1 JOHN CARROLL BLVD UNIVERSITY HEIGHTS, OH 44118		PC	TO SUPPORT NEOLAUNCHNET PROGRAMMING IN 2023-24	160,000
JOHN CARROLL UNIVERSITY 1 JOHN CARROLL BLVD UNIVERSITY HEIGHTS, OH 44118		PC	TO SUPPORT BURTON D. MORGAN MENTORING PROGRAM	333,000
JUMPSTART INC 6701 CARNEGIE AVE STE 100 CLEVELAND, OH 44103		PC	FOR ENTREPRENEURSHIP PROGRAMMING AND OPERATIONS	50,000
JUNIOR ACHIEVEMENT OF EASTERN OHIO 1601 MOTOR INN DRIVE 304 GIRARD, OH 44420		PC	FOR ENTREPRENEURSHIP PROGRAMMING AND OPERATIONS	60,000
JUNIOR ACHIEVEMENT OF GREATER CLEVELAND 1422 EUCLID AVENUE SUITE 952 CLEVELAND, OH 44115		PC	FOR ENTREPRENEURSHIP PROGRAMMING AND OPERATIONS	135,000
JUNIOR ACHIEVEMENT OF NORTH CENTRAL OHIO 4353 EXECUTIVE CIRCLE CANTON, OH 44718		PC	TO SUPPORT TRAVEL EXPENSES FOR TEAMS COMPETING IN THE 2023 NATIONAL COMPETITION	3,000
JUNIOR ACHIEVEMENT OF NORTH CENTRAL OHIO 4353 EXECUTIVE CIRCLE CANTON, OH 44718		PC	TO SUPPORT THE DEVELOPING ENTREPRENEURSHIP IN POSTSECONDARY EDUCATION FOR JUSTICE-INVOLVED LEARNERS PROGRAM	33,150
KENT STATE UNIVERSITY FOUNDATION 350 S LINCOLN ST PO BOX 5190 KENT, OH 44242		PC	TO SUPPORT MICROGRANTS IN 2023	40,000
KENT STATE UNIVERSITY FOUNDATION 350 S LINCOLN ST PO BOX 5190 KENT, OH 44242		PC	TO SUPPORT NEOLAUNCHNET PROGRAMMING IN 2023-24	185,000
KENT STATE UNIVERSITY FOUNDATION 350 S LINCOLN ST PO BOX 5190 KENT, OH 44242		PC	TO SUPPORT MICROGRANTS IN 2023	20,000
LAKELAND FOUNDATION 7700 CLOCKTOWER DRIVE KENT, OH 44242		PC	FOR DEI PROFESSIONAL DEVELOPMENT AND PROGRAMMING FOR STAFF AND STUDENTS AND FOR THE SENIOR SEMINAR PROGRAM	50,000
LAWRENCE SCHOOL 1551 E WALLINGS RD BROADVIEW HEIGHTS, OH 44147		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	250
LEADERSHIP HUDSON PO BOX 1078 HUDSON, OH 44236		PC	TO SUPPORT MICROGRANTS IN 2023	5,000
LORAIN COUNTY COMMUNITY COLLEGE FOUNDATION 1005 N ABBE RD CC220 ELYRIA, OH 44035		PC	TO SUPPORT NEOLAUNCHNET PROGRAMMING IN 2023-24	170,000
LORAIN COUNTY COMMUNITY COLLEGE FOUNDATION 1005 N ABBE RD CC220 ELYRIA, OH 44035		PC	FOR THE STEVE MOHR MEMORIAL SCHOLARSHIP FUND	2,500
LOUISVILLE COMMUNITY FOUNDATION		PC		

315 SOUTH CHAPEL STREET LOUISVILLE, OH 44641				
MORAGA GARDEN CLUB PO BOX 6062 MORAGA, CA 94570		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	20,000
MUSIC FROM THE WESTERN RESERVE PO BOX 265 HUDSON, OH 44236		PC	FOR THE 2023-24 CONCERT SEASON	3,000
NAMI SUMMIT COUNTY 150 CROSS ST AKRON, OH 44311		GOV	FOR NAMIWALKS SUMMIT COUNTY 2023, IN SUPPORT OF TEAM CRYSTAL'S CREW	500
NATIONAL SKI SHOW ASSOCIATION INC 2701 LAKE MYRTLE PARK ROAD AUBURNDALE, FL 33823		PC	FOR OPERATING SUPPORT FOR 2025 TEAM USA/ NSSA	10,000
NETWORK FOR TEACHING ENTREPRENEURSHIP 120 WALL STREET 18TH FLOOR NEW YORK, NY 10005		PC	FOR ENTREPRENEURSHIP PROGRAMMING	75,000
NORTH HILL COMMUNITY DEVELOPMENT CORPORATION 760 ELMA ST AKRON, OH 44310		PC	TO SUPPORT ENTREPRENEURSHIP PROGRAMMING	20,000
NORTHEAST OHIO HISPANIC CENTER FOR ECONOMIC DEVELOPMENT 2511 CLARK STREET CLEVELAND, OH 44109		PC	TO SUPPORT CONSTRUCTION OF CENTROVILLA25 FACILITY	200,000
NORTHEAST OHIO MEDICAL UNIVERSITY FOUNDATION 4209 STATE ROUTE 44 PO BOX 95 ROOTSTOWN, OH 44272		PC	FOR GENERAL OPERATING SUPPORT OF THE STUDENT RUN FREE CLINIC	25,000
NORTHEAST OHIO MEDICAL UNIVERSITY FOUNDATION 4209 STATE ROUTE 44 PO BOX 95 ROOTSTOWN, OH 44272		PC	TO SUPPORT MICROGRANTS IN 2023	20,000
NORTHEAST OHIO MEDICAL UNIVERSITY FOUNDATION 4209 STATE ROUTE 44 PO BOX 95 ROOTSTOWN, OH 44272		PC	TO SUPPORT THE NEOVATIONS PROGRAM IN 2023-24	58,250
NOTRE DAME COLLEGE 4545 COLLEGE ROAD EUCLID, OH 44121		PC	TO SUPPORT ENTREPRENEURSHIP ACTIVITIES	28,500
NOTRE DAME COLLEGE 4545 COLLEGE ROAD EUCLID, OH 44121		PC	TO SUPPORT MICROGRANTS IN 2023	15,000
OBERLIN COLLEGE 50 N PROFESSOR STREET OBERLIN, OH 44074		PC	TO SUPPORT MICROGRANTS IN 2023	10,000
OHIO & ERIE CANALWAY COALITION 47 W EXCHANGE STREET AKRON, OH 44308		PC	FOR THE CIVIC COMMONS PROJECT	25,000
OHIO WOMEN'S ALLIANCE 1255 N HAMILTON ROAD PMB 19 COLUMBUS, OH 43230		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500

PEAK GRANTMAKING 1666 K ST NW STE 440 WASHINGTON, DC 20006		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	2,250
PHILANTHROPY OHIO 500 S FRONT ST STE 900 COLUMBUS, OH 43215		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	7,000
PHILANTHROPY OHIO 500 S FRONT ST STE 900 COLUMBUS, OH 43215		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	20,000
PHILANTHROPY OHIO 500 S FRONT ST STE 900 COLUMBUS, OH 43215		PC	FOR SCHOLARSHIPS PROVIDED TO GRANTEES TO ATTEND THE NONPROFIT SUMMER LEARNING SERIES	1,100
PRESIDENTS' COUNCIL FOUNDATION INC 2814 DETROIT AVENUE SUITE 120 CLEVELAND, OH 44115		PC	TO GROW THE ORGANIZATIONS STAFF, INCLUDING THE ROLE OF CHIEF EXECUTIVE OFFICER AND OTHER HIGH-LEVEL STAFFING POSITIONS CRITICAL TO ORGANIZATIONAL GROWTH	135,000
PROJECT LEARN OF SUMMIT COUNTY 60 S HIGH ST AKRON, OH 44326		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	1,000
PROJECT LEARN OF SUMMIT COUNTY 60 S HIGH ST AKRON, OH 44326		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
PURDUE UNIVERSITY 403 WEST WOOD STREET WEST LAFAYETTE, IN 47907		PC	FOR THE MITCHELL E. DANIELS, JR. SCHOOL OF BUSINESS	100,000
RAPE CRISIS CENTER OF MEDINA AND SUMMIT COUNTIES 974 E MARKET STREET AKRON, OH 44305		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
RAZOM 140 2ND AVENUE SUITE 305 NEW YORK, NY 10003		PC	TO PROVIDE EMERGENCY RELIEF IN UKRAINE	50,000
RONALD MCDONALD HOUSE CHARITIES OF GREATER CINCINNATI 341 ERKENBRECHER AVENUE CINCINNATI, OH 45229		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	2,000
ROSE'S RESCUE PO BOX 33 ROOTSTOWN, OH 44272		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500
ROSE'S RESCUE PO BOX 33 ROOTSTOWN, OH 44272		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
SAINT MARY'S COLLEGE OF CALIFORNIA 1928 ST MARYS ROAD PBM 4300 MORAGA, CA 94575		PC	FOR THE MEN'S BASKETBALL PROGRAM	15,000
SEA CHANGE INCORPORATED 1271 E 1ST AVENUE COLUMBUS, OH 43212		PC	TO SUPPORT SEA CHANGES 2023 NORTHEAST OHIO COHORT	40,000
SEALKIDS 6734 PERIMETER LOOP ROAD SUITE 214		PC	TO SUPPORT CHILDREN AND FAMILIES OF NAVY SEALS	10,000

0/24 PERKMEIER LOOP ROAD SUITE 314 BREMEN, OH 43017				
SETON CATHOLIC SCHOOL 6923 STOW ROAD HUDSON, OH 44236		PC	TO SUPPORT THE HABITS OF THE HEART YOUTH PHILANTHROPY PROGRAM	4,000
SOLON COMMUNITY LIVING 6790 RIDGECLIFF DRIVE SOLON, OH 44139		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	49,000
ST PERPETUA CHURCH 3454 HAMLIN ROAD LAFAYETTE, CA 94549		PC	TO ASSIST A FAMILY SEEKING ASYLUM	10,000
STEWART'S CARING PLACE 3501 RIDGE PARK DRIVE AKRON, OH 44333		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
SUMMIT ARTSPACE 140 E MARKET ST 2ND FLOOR AKRON, OH 44308		PC	TO SUPPORT ARTIST ENTREPRENEURSHIP PROGRAMMING	20,000
TEEN ENTERPRISE FOUNDATION 22402 VERA ST CLEVELAND, OH 44128		PC	TO SUPPORT YOUTH ENTREPRENEURSHIP PROGRAMMING	5,000
THE COLLEGE OF WOOSTER 1189 BEALL AVE WOOSTER, OH 44691		PC	FOR CO-SPONSORSHIP OF THE PRESENTATION OF HOW TO SUCCEED IN BUSINESS	5,000
THE DIVERSITY CENTER OF NORTHEAST OHIO 3659 GREEN RD STE 220 BEACHWOOD, OH 44122		PC	FOR EVENT SPONSORSHIP, SPECIFICALLY FOR THE 69TH ANNUAL HUMANITARIAN AWARD CELEBRATION	500
THE ENTREPRENEURS EDGE 6801 BRECKSVILLE RD 160 INDEPENDENCE, OH 44131		PC	TO SUPPORT THE EDGE FELLOWS PROGRAM IN 2023	57,600
THE IAN PATRICK SCHWARBER FOUNDATION 755 RIDGECREST ROAD AKRON, OH 44303		PC	FOR THE BETTERMENT OF THE AKRON COMMUNITY	5,000
THE NATURE CONSERVANCY 6375 RIVERSIDE DRIVE SUITE 100 DUBLIN, OH 43017		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
THE OHIO FOUNDATION OF INDEPENDENT COLLEGES INC 60 COLLEGEVIEW ROAD SUITE 107 WESTERVILLE, OH 43081		PC	FOR SCHOLARSHIPS FOR STUDENTS OF COLOR TOWARD STUDIES RELATED TO BUSINESS OR ECONOMICS	5,000
THE PHILANTHROPY ROUNDTABLE 1120 20TH STREET NW WASHINGTON, DC 20036		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500
THE REFUGEE RESPONSE 2054 W 47TH STREET CLEVELAND, OH 44102		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500
THE REFUGEE RESPONSE 2054 W 47TH STREET CLEVELAND, OH 44102		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
THE UNIVERSITY OF AKRON FOUNDATION 150 UNIVERSITY AVE		PC	FOR THE H.K. BARKER CENTER FOR ECONOMICS EDUCATION	500

150 UNIVERSITY AVE AKRON, OH 443252901				
THE UNIVERSITY OF AKRON FOUNDATION 150 UNIVERSITY AVE AKRON, OH 443252901		PC	TO SUPPORT SEED CLINIC	85,900
THE WELL COMMUNITY DEVELOPMENT CORPORATION 647 EAST MARKET STREET AKRON, OH 44304		PC	TO SUPPORT AKRON FOOD WORKS	87,000
TOMTOD IDEAS 439 MARKET AVE N CANTON, OH 44702		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	10,000
UNITED DISABILITY SERVICES INC 701 S MAIN ST AKRON, OH 443111019		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	25,000
UNITED DISABILITY SERVICES INC 701 S MAIN ST AKRON, OH 443111019		PC	TO SUPPORT THE ALL-STAR TRAINING CLUB	500
UNITED WAY OF WAYNE AND HOLMES COUNTIES 215 S WALNUT ST PO BOX 548 WOOSTER, OH 44691		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	10,000
UNIVERSITY HOSPITALS HEALTH SYSTEM 11100 EUCLID AVE MCCO-5062 CLEVELAND, OH 44106		PC	FOR DIVERSITY, EQUITY AND INCLUSION INITIATIVES IN 2023-24	25,000
UNIVERSITY OF AKRON RESEARCH FOUNDATION 170 UNIVERSITY CIR AKRON, OH 443252103		SO III FI	TO ENHANCE THE CAPACITY OF THE ENTREPRENEURSHIP EDUCATION CONSORTIUM, PROMOTE EXPANDED COLLABORATION AMONG ECOSYSTEM STAKEHOLDERS, AND DESIGN/COORDINATE PROGRAMMING THAT ADDRESSES ECOSYSTEM NEEDS	92,950
UNIVERSITY OF AKRON RESEARCH FOUNDATION 170 UNIVERSITY CIR AKRON, OH 443252103		SO III FI	TO SUPPORT ENTRPRENEURSHIP EDUCATION CONSORTIUM	100,000
UNIVERSITY OF AKRON RESEARCH FOUNDATION 170 UNIVERSITY CIR AKRON, OH 443252103		SO III FI	TO SUPPORT THE STRIDE ACCELERATOR	50,000
UNIVERSITY OF HAWAII FOUNDATION 1314 SOUTH KING STREET SUITE B HONOLULU, HI 96814		PC	FOR THE MEN'S BASKETBALL PROGRAM	10,000
UNIVERSITY SCHOOL 2785 SOM CENTER RD HUNTING VALLEY, OH 44022		PC	FOR THE GREG MALKIN FUND FOR YOUTH ENTREPRENEURSHIP	20,000
UNIVERSITY SCHOOL 2785 SOM CENTER RD HUNTING VALLEY, OH 44022		PC	TO SUPPORT YOUNG ENTREPRENEUR INSTITUTE	204,000
UNIVERSITY SCHOOL 2785 SOM CENTER RD HUNTING VALLEY, OH 44022		PC	FOR THE YIPPEE SPONSORSHIP FUND	1,250
UNIVERSITY SCHOOL		PC	TO LAUNCH ENTREPRENEW NATIONWIDE AND EXPLORE INTEGRATION INTO OHIO CTE	201,285

2785 SOM CENTER RD HUNTING VALLEY, OH 44022				
UNIVERSITY SCHOOL 2785 SOM CENTER RD HUNTING VALLEY, OH 44022		PC	TO SUPPORT THE 2023 ENSPIRE CONFERENCE	215,000
URSULINE COLLEGE 2550 LANDER ROAD PIKE, OH 44124		PC	FOR ENTREPRENEURSHIP PROGRAMMING	15,000
VENTURE FOR AMERICA INC 307 7TH AVE STE 1201 NEW YORK, NY 10001		PC	TO SUPPORT VFA'S NORTHEAST OHIO PROGRAM	75,000
VENTURELAB 200 W 6TH STREET SUITE 1700 AUSTIN, TX 78701		PC	TO SUPPORT THE SPARK STARTUP MENTORSHIP PROGRAM	20,000
VENTUREWELL 100 VENTURE WAY HADLEY, MA 01035		PC	TO SPONSOR OPEN 23 AND THE DESHPANDE SYMPOSIUM	20,000
WESTERN RESERVE ACADEMY 115 COLLEGE ST HUDSON, OH 44236		PC	TO SUPPORT THE STUDENT PHILANTHROPY PROGRAM	4,000
WESTERN RESERVE COMMUNITY FUND 1 CASCADE PLAZA SUITE 1700 AKRON, OH 44308		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	200,000
WESTERN RESERVE HISTORICAL SOCIETY 10825 E BLVD CLEVELAND, OH 44106		PC	FOR YEE FOR CLE IN THE 2023-24 ACADEMIC YEAR	130,000
WESTERN RESERVE LAND CONSERVANCY 3850 CHAGRIN RIVER ROAD MORELAND HILLS, OH 44022		PC	FOR THE CLEVELAND TREE COALITION	25,000
WOMENSAFE INC 12041 RAVENNA ROAD CHARDON, OH 44024		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	2,000
WORTHINGTON CHRISTIAN SCHOOL 6675 WORTHINGTON GALENA ROADCOLUMBU OH 43085 COLUMBUS, OH 43085		PC	TO SUPPORT THE EXEMPT PURPOSE OF ORGANIZATION	500
YOUNGSTOWN STATE UNIVERSITY FOUNDATION 655 WICK AVENUE YOUNGSTOWN, OH 44502		PC	TO SUPPORT ENTREPRENEURIAL PATHWAYS, CO-CURRICULAR OFFERINGS, AND MICROGRANTS	10,000
YOUNGSTOWN STATE UNIVERSITY FOUNDATION 655 WICK AVENUE YOUNGSTOWN, OH 44502		PC	TO SUPPORT MICROGRANTS IN 2023	20,000
YOUNGSTOWN STATE UNIVERSITY FOUNDATION 655 WICK AVENUE YOUNGSTOWN, OH 44502		PC	TO SUPPORT THE HONORS COLLEGE	500
Total			3a	7,338,937
b <i>Approved for future payment</i>				

Form **990-PF** (2023)Page **12**

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
Enter gross amounts unless otherwise indicated.				
1 Program service revenue:				
a _____				
b _____				
c _____				
d _____				
e _____				
f _____				
g Fees and contracts from government agencies				
2 Membership dues and assessments				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities		14	4,518,142	
5 Net rental income or (loss) from real estate:				
a Debt-financed property.				
b Not debt-financed property.		16	100	
6 Net rental income or (loss) from personal property				
7 Other investment income		01	309,342	
8 Gain or (loss) from sales of assets other than inventory		18	7,682,756	
9 Net income or (loss) from special events:				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue: a _____				
b _____				
c _____				
d _____				
e _____				
12 Subtotal. Add columns (b), (d), and (e)				
	0		12,510,340	0
13 Total. Add line 12, columns (b), (d), and (e). 13 12,510,340				

(See worksheet in line 13 instructions to verify calculations.)

[illegible]

[illegible]

Page 13

Page **13**

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

[illegible]

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Cinn

10/27/25, 7:05 PM

Burton D Morgan Foundation Inc - Full Filing - Nonprofit Explorer - ProPublica

Sign Here

2024-10-21

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below?

See instructions. ☐ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name

KRISTEN BARNETT

Preparer's Signature

Date

2024-10-12

Check if self-employed ☐

PTIN

P01234578

Firm's name ▶ RSM US LLP

Firm's EIN ▶ 42-0714325

Firm's address ▶ 1001 WATER ST STE 500

TAMPA, FL 33602

Phone no. (813) 316-2300

Form 990-PF (2023)

Additional Data

Return to Form

Software ID:
Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Name: BURTON D MORGAN FOUNDATION INC
EIN: 34-6598971

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AUDIT	22,981	3,013		19,968
RETIREMENT PLAN FEES	17,996	2,359		15,637
TAX PREPARATION	11,550	1,514		10,349

efile Public Visual Render	ObjectID: 202402979349100620 - Submission: 2024-10-23	TIN: 34-6598971
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Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2023 IRS 990 e-File Render

Name: BURTON D MORGAN FOUNDATION INC

EIN: 34-6598971

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
BALDWIN HOUSE	2007-12-03	14,493	5,465	SL	40.0000000000000	362	0		
BALDWIN HOUSE	2007-12-03	47,482	17,905	SL	40.0000000000000	1,187	0		
WELTY RENOVATIONS - BALDWIN HOUSE	2007-12-03	35,000	13,198	SL	40.0000000000000	875	0		
CONSTRUCTION COSTS	2007-12-03	128,697	48,530	SL	40.0000000000000	3,217	0		
BALDWIN HOUSE - LANDSCAPING	2007-12-03	5,588	5,588	SL	15.0000000000000	0	0		
LANDSCAPING - BH	2007-12-03	11,579	11,579	SL	15.0000000000000	0	0		
CONSTRUCTION COSTS	2007-12-03	21,730	8,194	SL	40.0000000000000	543	0		
BALDWIN HOUSE - ARCH SERVICES	2007-12-03	455	172	SL	40.0000000000000	11	0		
WATER METER	2007-12-03	675	675	SL	15.0000000000000	0	0		
LANDSCAPE ARCH DESIGN - BH	2007-12-03	1,125	1,125	SL	15.0000000000000	0	0		
ARCH SERVICES	2007-12-03	982	370	SL	40.0000000000000	25	0		
BALDWIN HOUSE	2007-12-03	324	122	SL	40.0000000000000	8	0		
CONSTRUCTION COSTS	2007-12-03	17,521	6,607	SL	40.0000000000000	438	0		
DOOR, HARDWARE AND INSTALLATION	2008-03-07	2,234	828	SL	40.0000000000000	56	0		
BH THRESHOLD BASEMENT	2008-06-13	455	166	SL	40.0000000000000	11	0		
EXTERIOR LAMPS AND WIRING	2008-07-28	731	731	SL	10.0000000000000	0	0		
BALDWIN HOUSE EXTERIOR PAINTING	2008-09-11	1,710	613	SL	40.0000000000000	43	0		
IMPROVEMENTS	2009-09-14	1,652	551	SL	40.0000000000000	41	0		
NEW FUNERAL DOOR	2015-09-15	3,720	682	SL	40.0000000000000	93	0		
EXTERIOR LIGHTS	2006-11-14	1,039	1,039	SL	10.0000000000000	0	0		
PARKING LOT SIGNS	2006-07-31	1,086	1,086	SL	15.0000000000000	0	0		
BUILDING - PURCHASE AND COSTS	2006-09-09	798,176	325,922	SL	40.0000000000000	19,954	0		
ARCHITECT FEES	2006-09-09	120,903	49,368	SL	40.0000000000000	3,023	0		
ARCHITECT FEES	2006-09-09	75,387	30,783	SL	40.0000000000000	1,885	0		
BATH SPECIALITIES (WELTY - ITEM NO. 9)	2006-09-06	4,031	4,031	SL	5.0000000000000	0	0		
GRADING & EARTHWORK (WELTY - ITEM NO. 14)	2006-09-06	141,413	141,413	SL	15.0000000000000	0	0		
SITE UTILITIES (WELTY - ITEM NO. 15)	2006-09-09	17,573	17,573	SL	15.0000000000000	0	0		
CONCRETE PAVING (WELTY ITEM NO. 21/22)	2006-09-09	14,757	14,757	SL	15.0000000000000	0	0		
FLOORING (WELTY ITEM NO. 35/CO9/CO17)	2006-09-06	74,670	74,670	SL	5.0000000000000	0	0		
FIRE EXTINGUISHERS (WELTY ITEM NO. 38/39)	2006-09-06	758	758	SL	5.0000000000000	0	0		
WINDOW TREATMENTS (WELTY ITEM NO. 41)	2006-09-06	9,718	9,718	SL	5.0000000000000	0	0		
SECURITY SYSTEM (WELTY ITEM NO. 49/CO18)	2006-09-06	17,876	17,876	SL	15.0000000000000	0	0		
TOILET SEAT COVERS (WELTY ITEM NO. CO3)	2006-09-06	201	201	SL	5.0000000000000	0	0		
SITE CONCRETE (WELTY ITEM NO. CO6)	2006-09-06	17,040	17,040	SL	15.0000000000000	0	0		
CONCRETE EXTRAS (WELTY ITEM NO. CO11)	2006-09-06	3,502	3,502	SL	15.0000000000000	0	0		
MIRRORS (WELTY ITEM NO. CO21/CO25)	2006-09-06	939	939	SL	5.0000000000000	0	0		
RENOVATIONS 22	2006-09-06	1,796,368	733,517	SL	40.0000000000000	44,909	0		

AUKUKA S.I.									
KITCHEN BACKSPLASH	2006-09-09	1,486	1,486	SL	15.000000000000	0	0		
SIGNAGE - LOBBY & RESTROOM	2007-05-31	6,266	6,266	SL	15.000000000000	0	0		
ARCHITECTURAL SERVICES	2007-07-06	12,090	4,685	SL	40.000000000000	302	0		
REAR STAIRWELL DOOR	2007-07-06	2,933	1,100	SL	40.000000000000	73	0		
BASEMENT DEHUMIDIFIER	2008-04-18	2,059	755	SL	40.000000000000	51	0		
SEWAGE PUMP - BASEMENT	2008-05-01	1,563	573	SL	40.000000000000	39	0		
TELEPHONE LINES	2008-09-12	2,562	918	SL	40.000000000000	64	0		
ROOF RESTORATION / SIDING REPLACEMENT	2009-06-11	10,900	9,871	SL	15.000000000000	727	0		
BLDG FINAL PAYMENT	2010-12-28	5,000	1,500	SL	40.000000000000	125	0		
PLASTIC VAPOR BARRIER FOR CRAWL SPACE	2013-05-23	1,100	703	SL	15.000000000000	73	0		
HVAC EXPANSION TANK	2013-05-07	2,150	1,386	SL	15.000000000000	143	0		
HVAC COMPRESSOR	2014-07-23	3,063	1,719	SL	15.000000000000	204	0		
PRISM II SOFTWARE CONVERSION	2016-05-12	1,913	1,275	SL	10.000000000000	191	0		
HVAC ZONE CONTROLLER ZONE 5	2016-05-24	1,304	859	SL	10.000000000000	130	0		
VIDEO INTERCOM DOOR SYSTEM	2017-09-11	3,490	1,241	SL	15.000000000000	233	0		
HOT WATER TANK - BASEMENT	2018-08-14	2,051	906	SL	10.000000000000	205	0		
HEAT EXCHANGER UNIT	2019-01-15	5,100	1,360	SL	15.000000000000	340	0		
GARDENS LIMITED-LANDSCAPING	2006-09-09	11,772	11,772	SL	15.000000000000	0	0		
GARDENS LIMITED-LANDSCAPING	2006-09-09	10,365	10,365	SL	15.000000000000	0	0		
GARDENS LIMITED-LANDSCAPING	2006-10-04	23,819	23,819	SL	15.000000000000	0	0		
GARDENS LIMITED-LANDSCAPING	2006-11-16	3,850	3,850	SL	15.000000000000	0	0		
GARDENS LIMITED-LANDSCAPING	2006-12-05	2,460	2,460	SL	15.000000000000	0	0		
GARDENS LIMITED-LANDSCAPING	2006-12-28	1,489	1,489	SL	15.000000000000	0	0		
GARDENS LIMITED	2006-12-05	18,810	18,810	SL	15.000000000000	0	0		
WROUGHT IRON FENCE AND MISC	2007-03-20	6,666	6,666	SL	15.000000000000	0	0		
INSTALL CUT STONE IN FOUNTAIN	2007-04-09	2,552	2,552	SL	15.000000000000	0	0		
2 BENCHES IN COURTYARD	2011-06-30	1,128	1,128	SL	10.000000000000	0	0		
SANDSTONE STEPS IN COURTYARD	2015-05-22	4,220	2,133	SL	15.000000000000	281	0		
SUNCREST GARDENS - FRONT BED LANDSCAPING	2016-09-14	6,876	2,900	SL	15.000000000000	458	0		
LANDSCAPE PLANTS	2020-12-10	1,884	785	SL	5.000000000000	377	0		
COURTYARD STONEWORK AND CONCRETE PLANTER	2022-05-10	2,542	113	SL	15.000000000000	113	0		
COMPUTER MONITOR - (SKL -2)	2010-04-30	169	169	SL	3.000000000000	0	0		
BROMELKAMP EGRANT SOFTWARE MODULE	2010-09-01	11,313	11,313	SL	3.000000000000	0	0		
SKL - MONITOR	2012-03-16	151	151	SL	3.000000000000	0	0		
GMD MONITOR	2012-11-01	139	139	SL	3.000000000000	0	0		
FIRST PEARL LICENSE (4)	2013-02-01	1,220	1,220	SL	3.000000000000	0	0		
TRIPP-LITE RACKMOUNT KVM CONSOLE	2013-12-03	679	679	SL	5.000000000000	0	0		
WIRELESS UPGRADE	2014-12-01	3,797	3,797	SL	3.000000000000	0	0		
BACKUP ISP	2014-12-01	1,199	1,199	SL	3.000000000000	0	0		
IPAD AIR 2 - DDH	2015-03-04	750	750	SL	3.000000000000	0	0		
SERVER SWITCH UPGRADE	2015-07-08	11,466	11,466	SL	5.000000000000	0	0		
IPAD AIR 3 DMG	2015-07-29	678	678	SL	3.000000000000	0	0		
NEOLAUNCHNET SOFTWARE PLATFORM	2016-05-01	63,960	63,960	SL	5.000000000000	0	0		
DELL LATTITUDE LAPTOP SPARE	2016-03-08	989	989	SL	3.000000000000	0	0		
CTISCO MFRAKT	2016-04-01	3,620	3,620	SL	3.000000000000	0	0		

FIREWALL UPGRADE									
D. GRIGGS MONITORS (2)	2011-01-03	358	358	SL	3.000000000000	0	0		
AKOYA GRANTS MGMT PLATFORM	2018-12-31	5,715	5,715	SL	3.000000000000	0	0		
EGRANT BUILDER PLATFORM	2018-04-04	2,500	2,500	SL	3.000000000000	0	0		
VUB LAPTOP LATITUDE 5580	2018-04-11	1,923	1,923	SL	3.000000000000	0	0		
ADD'L CONFIGURATION TO NLN PLATFORM	2018-07-24	1,950	1,723	SL	5.000000000000	0	0		
ADDN TO NLN PLATFORM FOR JCU	2018-10-15	1,125	956	SL	5.000000000000	0	0		
ADD'L CONFIGURATION TO AKOYA PLATFORM	2019-01-15	4,781	4,781	SL	3.000000000000	0	0		
ADD'L CONFIGURATION TO EGRANT PLATFORM	2019-02-13	960	960	SL	3.000000000000	0	0		
2ND ADD'L CONFIGURATION TO AKOYA PLATFORM	2019-02-13	5,325	5,325	SL	3.000000000000	0	0		
LATITUDE E5590 LAPTOP EBW & SETUP	2019-03-01	2,120	2,120	SL	3.000000000000	0	0		
OPTIPLEX 5060 DESKTOP DMG & SET UP	2019-03-01	1,580	1,580	SL	3.000000000000	0	0		
ACCESS UPGRADE TO DOORS.NET	2019-03-04	2,083	2,083	SL	3.000000000000	0	0		
LATITUDE 5500 LAPTOP AKE	2020-03-12	1,667	1,574	SL	3.000000000000	0	0		
LATITUDE 5500 LAPTOP GMD	2020-03-12	1,667	1,574	SL	3.000000000000	0	0		
LATITUDE 5500 LAPTOP DDH	2020-03-12	1,667	1,574	SL	3.000000000000	0	0		
DELL LATITUDE 5500 SVR LAPTOP DMG	2020-07-15	1,709	1,424	SL	3.000000000000	0	0		
SHAREPOINT SERVER MIGRATION	2021-02-28	10,163	1,424	SL	5.000000000000	2,033	0		
LATITUDE 5520 LAPTOP VUB	2021-04-01	1,709	1,424	SL	3.000000000000	285	0		
LATITUDE 5520 LAPTOP INNOVATION RM	2021-04-01	1,704	1,373	SL	3.000000000000	331	0		
OPTIPLEX DESKTOP TOWER - SNP	2022-04-07	895	224	SL	3.000000000000	224	0		
DELL LATITUDE 5520 LAPTOP - JMS	2022-04-07	1,885	471	SL	3.000000000000	471	0		
DELL LATITUDE 5520 LAPTOP - EB	2022-04-07	1,885	471	SL	3.000000000000	471	0		
SHAREPOINT MIGRATION PHASE II	2022-06-07	4,840	565	SL	5.000000000000	565	0		
LATITUDE 5531 LAPTOP DJH	2022-10-10	2,544	212	SL	3.000000000000	212	0		
OPTIPLEX 3000 DESKTOP JMS	2022-10-10	920	77	SL	3.000000000000	77	0		
LAPTOP 5530 AKE	2023-12-31	1,820		SL	3.000000000000	506	0		
LAPTOP 5530 GMD	2023-12-31	1,820		SL	3.000000000000	506	0		
DESKTOP 5000 DMG	2023-12-31	971		SL	3.000000000000	270	0		
DELL LATITUDE 5540 LAPTOP SNP	2023-12-31	1,576		SL	3.000000000000	88	0		
DELL LATITUDE 5540 LAPTOP MBM	2023-12-31	1,576		SL	3.000000000000	88	0		
DELL LATITUDE 5540 LAPTOP TBD	2023-12-31	1,576		SL	3.000000000000	88	0		
NETWORK UPGRADE	2023-12-31	2,550		SL	3.000000000000	0	0		
FURNITURE	1993-06-30	1,925	1,925	SL	10.000000000000	0	0		
FURN	1993-08-31	3,844	3,844	SL	10.000000000000	0	0		
CHAIRS-FOREMOST	1994-02-28	1,394	1,394	SL	10.000000000000	0	0		
FILE CABINETS-FOREMOST	1994-04-30	1,003	1,003	SL	10.000000000000	0	0		
FILE CABINET	2000-02-20	1,306	1,306	SL	10.000000000000	0	0		
DESK - BREWSTER STROUD	1995-11-21	952	952	SL	10.000000000000	0	0		
FURNITURE	1996-03-19	1,740	1,740	SL	10.000000000000	0	0		
FILE CABINET	2002-02-28	1,306	1,306	SL	10.000000000000	0	0		
PORTRAIT 30 X 24	2003-10-31	3,400	3,400	SL	10.000000000000	0	0		
LATERAL FILE	2003-12-15	1,494	1,494	SL	10.000000000000	0	0		
FIREKING FILE	2003-12-15	1,574	1,574	SL	10.000000000000	0	0		
FURNITURE	2004-01-15	799	799	SL	10.000000000000	0	0		
FURNITURE	2004-04-15	10,757	10,757	SL	10.000000000000	0	0		
CREDENZA	2004-06-17	220	220	SL	10.000000000000	0	0		

OFFICE FURNISHINGS	2004-07-01	886	886	SL	10.000000000000	0	0		
FILE CABINET	2004-07-01	886	886	SL	10.000000000000	0	0		
PRINTER STAND/STORAGE	2005-01-14	868	868	SL	10.000000000000	0	0		
DDH TABLE	2005-07-01	536	536	SL	10.000000000000	0	0		
DDH TABLE/DESK	2005-09-01	535	535	SL	10.000000000000	0	0		
BONFOEY - ARTWORK	2005-10-24	4,440	4,440	SL	10.000000000000	0	0		
BDM PORTRAIT	2006-02-01	3,400	3,400	SL	10.000000000000	0	0		
WINDSOR CHAIRS	2006-05-15	5,023	5,023	SL	10.000000000000	0	0		
MAINE COTTAGE	2006-07-12	453	453	SL	10.000000000000	0	0		
INTERSTATE	2006-07-28	4,726	4,726	SL	10.000000000000	0	0		
FURNITURE	2006-08-15	61,600	61,600	SL	10.000000000000	0	0		
CHEST	2006-09-04	2,100	2,100	SL	10.000000000000	0	0		
MAPLE SERVER	2006-09-04	750	750	SL	10.000000000000	0	0		
ROCKWELL PRINT	2006-09-29	7,050	7,050	SL	10.000000000000	0	0		
CREDENZA	2006-11-13	1,389	1,389	SL	10.000000000000	0	0		
FURNITURE	2006-11-17	1,184	1,184	SL	10.000000000000	0	0		
FRAMING	2006-11-17	1,414	1,414	SL	10.000000000000	0	0		
FURNITURE	2006-11-20	12,059	12,059	SL	10.000000000000	0	0		
FURNITURE	2006-09-09	87,605	87,605	SL	10.000000000000	0	0		
ROCKWELL PRINT-DOWNHILL RACER	2006-12-20	3,850	3,850	SL	10.000000000000	0	0		
WARWICK COMMUNICATIONS	2006-09-09	53,509	53,509	SL	10.000000000000	0	0		
ROSE UPHOLSTRY - CHAIR	2006-12-05	870	870	SL	10.000000000000	0	0		
BOARDROOM CREDENZA	2007-03-09	1,437	1,437	SL	10.000000000000	0	0		
BLUE SIDEBORD - KITCHEN	2007-05-31	3,812	3,812	SL	10.000000000000	0	0		
FRAMING DENISON	2007-04-09	450	450	SL	10.000000000000	0	0		
FRAMING DOWNHILL RACER	2007-04-09	527	527	SL	10.000000000000	0	0		
ROCKWELL PRINT EXTRA GOOD BOYS & GIRLS	2007-04-17	10,050	10,050	SL	10.000000000000	0	0		
UPHOLSTERY MR. MORGAN'S CHAIRS	2007-04-30	1,700	1,700	SL	10.000000000000	0	0		
FRAMING ROCKWELL SANTA	2007-06-22	1,301	1,301	SL	10.000000000000	0	0		
FRAMING PURDUE	2007-06-22	905	905	SL	10.000000000000	0	0		
REPROGRAMMING BOARD ROOM EQUIPMENT	2007-12-15	3,900	3,900	SL	10.000000000000	0	0		
JCVN OFFICER CHAIR	2008-02-08	1,453	1,453	SL	10.000000000000	0	0		
DMG OFFICE CHAIR	2008-02-08	1,453	1,453	SL	10.000000000000	0	0		
MEE CREDENZA	2008-02-08	2,169	2,169	SL	10.000000000000	0	0		
BDM PORTRAIT-MITSUNO ISHII REEDY	2008-05-31	6,500	6,500	SL	10.000000000000	0	0		
FRAMING LEWIS & REEDY	2008-06-09	415	415	SL	10.000000000000	0	0		
CAD DOCUMENTATION	2008-06-26	900	900	SL	10.000000000000	0	0		
HUANG ARTWORK & FRAMING	2008-07-09	262	262	SL	10.000000000000	0	0		
CHUCK KOVACIC ARTWORK & FRAMING	2008-07-09	223	223	SL	10.000000000000	0	0		
NORMAN ROCKWELL "AMERICA MARCHES FORWARD"	2008-10-03	4,050	4,050	SL	10.000000000000	0	0		
FRAMING "AMERICA MARCHES FORWARD"	2008-12-01	594	594	SL	10.000000000000	0	0		
2 DRAWER LATERAL FIRE KING FILE	2009-02-04	1,395	1,395	SL	10.000000000000	0	0		
2 DRAWER LATERAL FIRE KING FILE	2009-02-04	1,395	1,395	SL	10.000000000000	0	0		
CHENOWETH PORTRAIT	2009-09-23	1,262	1,262	SL	10.000000000000	0	0		
NORMAN ROCKWELL "HIGH DIVE"	2009-12-22	6,500	6,500	SL	10.000000000000	0	0		
FRAMING "HIGH DIVE"	2009-12-22	1,890	1,890	SL	10.000000000000	0	0		
NORMAN ROCKWELL "COUNTY AGRICULTURE AGENT"	2011-06-15	6,000	6,000	SL	10.000000000000	0	0		
FRAME FOR ROCKWELL - COUNTY AG	2011-06-15	1,673	1,673	SL	10.000000000000	0	0		

FOUNTAIN PAINTING AND FRAM	2011-07-01	900	900	SL	10.000000000000	0	0		
BDFM BLDG PAINTING "ARTWORK"	2011-07-01	550	550	SL	10.000000000000	0	0		
SHADOWBOX FOR GLIDER SUIT	2012-09-18	2,575	2,382	SL	10.000000000000	193	0		
GMD TASK CHAIR	2012-11-13	526	482	SL	10.000000000000	44	0		
PHONE SYSTEM EQUIP - ROUTER & TRUNK	2014-01-16	1,404	1,112	SL	10.000000000000	140	0		
INNOVATION RM FURNISHINGS (DOWN PYMT)	2015-04-14	14,503	9,790	SL	10.000000000000	1,450	0		
P. KELLEY 38TH STREET PAINTING	2015-01-05	6,000	4,200	SL	10.000000000000	600	0		
BDM PORTRAIT (FARR)	2015-12-23	3,400	2,040	SL	10.000000000000	340	0		
ARTWORK "PLAYGROUND" HARRIET MORORE BALLARD	2015-03-26	6,000	4,050	SL	10.000000000000	600	0		
WIRELESS POLYCOM PHONE	2015-04-01	1,450	1,450	SL	5.000000000000	0	0		
INNOVATION ROOM FURNISHINGS - 2ND PYMT	2015-04-01	13,068	8,821	SL	10.000000000000	1,307	0		
SECURITY AIRPHONE - INNOVATION RM	2015-04-15	965	651	SL	10.000000000000	97	0		
GAULT PORTRAIT	2015-08-18	1,000	633	SL	10.000000000000	100	0		
INNOVATION FURNITURE FINAL PAYMENT	2015-08-01	1,435	921	SL	10.000000000000	143	0		
MODULAR PANELS - LIBRARY/OFFICE	2015-09-01	1,650	1,045	SL	10.000000000000	165	0		
FRAME - GAULT PORTRAIT	2015-08-21	441	279	SL	10.000000000000	44	0		
FRAME FOR BDM PORTRAIT (FARR)	2015-12-23	565	339	SL	10.000000000000	57	0		
DIGITAL SIGNAGE SYSTEM	2016-11-30	3,349	1,646	SL	10.000000000000	335	0		
TOSHIBA PHONE SYSTEM AND INSTALLATION	2016-11-21	15,747	8,005	SL	10.000000000000	1,575	0		
WORKROOM A/C UNIT AND ROOF CONDENSER	2018-03-07	9,760	3,741	SL	10.000000000000	976	0		
SECURITY CAMERA UPGRADE	2018-03-27	3,975	1,491	SL	10.000000000000	398	0		
CELLULAR COMMUNICATOR FOR SECURITY SYSTEM	2018-04-11	1,260	473	SL	10.000000000000	126	0		
HERMAN MILLER EMBODY CHAIR JMS	2019-05-07	935	249	SL	10.000000000000	94	0		
BARCO WIRELESS PRESENTATION SYSTEM INNOV RM	2019-05-22	4,054	1,047	SL	10.000000000000	405	0		
ERBAUGH PORTRAIT & FRAMING	2019-09-01	1,659	387	SL	10.000000000000	166	0		
DEHUMIDIFIER FOR VAULT ROOM IN BASEMENT	2019-11-01	3,920	849	SL	10.000000000000	392	0		
BOILER PUMPS AND MOTORS	2020-12-01	4,041	292	SL	15.000000000000	269	0		
CPW5V-22 SEWER EJECTION PUMP	2021-04-20	2,286	102	SL	15.000000000000	152	0		
BOARDROOM AND INNOV RM AV EQUIPMENT	2021-06-16	33,671	3,367	SL	5.000000000000	6,734	0		
BOARDROOM MEETING CAMERA	2021-09-10	1,636	109	SL	5.000000000000	327	0		
DDH PORTRAIT AND FRAMING	2022-05-01	2,053		SL	10.000000000000	137	0		
ARCHITECT FEES	2015-04-01	24,039	4,057	SL	40.000000000000	601	0		
TECH DESIGN & INSTALL	2015-04-01	4,811	812	SL	40.000000000000	120	0		
REMODEL - RUHLIN PYMT 1	2015-04-01	36,011	6,077	SL	40.000000000000	900	0		
REMODEL RUHLIN PAYMENT 2	2015-04-01	65,578	11,066	SL	40.000000000000	1,639	0		
DATA AND PHONE CABLING	2015-04-01	1,264	213	SL	40.000000000000	32	0		
RUHLIN REMODEL - PAYMENT 3	2015-04-01	70,408	11,881	SL	40.000000000000	1,760	0		
RUHLIN REMODEL - FINAL PAYMENT	2015-04-01	16,774	2,831	SL	40.000000000000	419	0		
YIPPEE PLATFORM V.1	2021-12-01	199,810	47,774	SL	5.000000000000	56,761	0		
YIPPEE PLATFORM V.2	2022-12-31	163,970	16,041	SL	5.000000000000	16,041	0		

[efile Public Visual Render](#)

ObjectId: 202402979349100620 - Submission: 2024-10-23

TIN: 34-6598971

TY 2023 IRS 990 e-File Render**Name:** BURTON D MORGAN FOUNDATION INC**EIN:** 34-6598971**Statement:**

OHIO DOES NOT REQUIRE A COPY OF THE FORM 990-PF, IT REQUIRES A SEPARATE ON-LINE REGISTRATION FILING AND FILING FEE.

[efile Public Visual Render](#)

ObjectId: 202402979349100620 - Submission: 2024-10-23

TIN: 34-6598971

TY 2023 IRS 990 e-File Render**Name:** BURTON D MORGAN FOUNDATION INC**EIN:** 34-6598971

Name of Bond	End of Year Book Value	End of Year Fair Market Value
LORD ABBETT INVT TR SHORT DURATION INCOME FUND	5,051,691	5,051,691

efile Public Visual Render

ObjectID: 202402979349100620 - Submission: 2024-10-23

TIN: 34-6598971

TY 2023 IRS 990 e-File Render**Name:** BURTON D MORGAN FOUNDATION INC**EIN:** 34-6598971

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ORION S A COM NPV	54,600	54,600
ADR UNILEVER PLC SPONSORED ADR NEW	52,116	52,116
#REORG PHYSICIANS STOCK MERGER HEALTHPEAK	87,460	87,460
ADOBE INC COM	345,431	345,431
AGNC INVT CORP COM	87,701	87,701
AIR PROD & CHEM INC COM	220,409	220,409
AIR PROD & CHEM INC COM	1,369,000	1,369,000
AIRBNB INC CL A COM USD0.0001 CL A	354,781	354,781
ALEXANDER & BALDWIN INC	45,743	45,743
ALLETE INC COM NEW	86,480	86,480
ALPHABET INC CAP STK USD0.001 CL C	446,748	446,748
AMAZON COM INC COM	930,481	930,481
AMCOR PLC ORD USD0.01	2,220,873	2,220,873
AMER ELEC PWR CO INC COM	144,978	144,978
AMERICAN TOWER CORP	235,309	235,309
AMERIS BANCORP COM	81,326	81,326
ANALOG DEVICES INC COM	292,280	292,280
ANDERSONS INC COM	68,875	68,875
APPLE INC COM STK	622,257	622,257
APPLE INC COM STK	1,340,394	1,340,394
ARCBEST CORP COM USD0.01	78,497	78,497
ARCH RES INC DEL CL A CL A	75,337	75,337
ARISTA NETWORKS INC COM	593,250	593,250
ARTISAN PARTNERS ASSET MGMT INC CL A	57,788	57,788
ASSURED GUARANTY LTD COMMON STK	58,891	58,891
ATI INC COM	78,390	78,390
ATKORE INC	59,840	59,840
ATLANTIC UN BANKSHARES CORP COM	74,322	74,322
ATLAS ENERGY SOLUTIONS INC	61,200	61,200

NEW CL A		
AUTOMATIC DATA PROCESSING INC COM	246,715	246,715
BANC CALIF INC COM	47,274	47,274
BANNER CORP COM NEW COM NEW	70,967	70,967
BELDEN INC COM	69,834	69,834
BERKSHIRE HATHAWAY INC COM	2,213,432	2,213,432
BK HAW CORP COM	91,227	91,227
BLACKROCK INC COM STK	493,574	493,574
BLOOMIN BRANDS INC COM	62,606	62,606
BRINKS CO COM	81,354	81,354
BROOKDALE SR LIVING INC COM STK	43,644	43,644
BWX TECHNOLOGIES INC COM	49,107	49,107
CALIFORNIA RES CORP COM	58,890	58,890
CARETRUST REIT INC COM	52,280	52,280
CHEVRON CORP COM	587,989	587,989
CHIPOTLE MEXICAN GRILL INC COM STK	530,575	530,575
CHORD ENERGY CORPORATION COM	85,110	85,110
CINEMARK HLDGS INC COM	41,960	41,960
CISCO SYSTEMS INC	370,564	370,564
CIVITAS RES INC COM	75,218	75,218
CME GROUP INC COM STK	254,826	254,826
COCA COLA CO COM	187,221	187,221
COLLEGIUM PHARMACEUTICAL INC COM	56,543	56,543
COMMERCIAL METALS CO COM	85,418	85,418
CORE & MAIN INC COM CL A COM CL A	65,626	65,626
COSTCO WHOLESALE CORP NEW COM	569,649	569,649
CURTISS WRIGHT CORP COM	61,045	61,045
CVS HEALTH CORP COM	358,794	358,794
DATADOG INC COM	189,231	189,231
DEXCOM INC COM	672,816	672,816
DIAMOND OFFSHORE DRILLING INC COM NEW	81,614	81,614
DIAMONDROCK HOSPITALITY CO COM STK	70,951	70,951
DIODES INC COM	71,421	71,421
DOW INC	421,217	421,217

DOW INC	431,317	431,317
DYNEX CAPITAL INC COM	56,340	56,340
EASTERLY GOVERNMENT PROPERTI COMMON STOCK	64,042	64,042
ECOVYST INC COM	41,913	41,913
EDGEWELL PERS CARE CO COM	44,689	44,689
ELI LILLY & CO COM	522,296	522,296
EMERSON ELECTRIC CO COM	885,703	885,703
ENCOMPASS HEALTH CORP COM	37,230	37,230
ESAB CORPORATION COM	57,256	57,256
ESSENTIAL PROPERTIES REALTY TR INC	77,140	77,140
FEDERAL SIGNAL CORP COM	41,363	41,363
FIRST BANCORP N C COM	58,957	58,957
FIRST MERCHANTS CORP COM	83,615	83,615
FLUOR CORP NEW COM	73,953	73,953
FORMFACTOR INC COM STK	70,907	70,907
GAP INC COM	65,114	65,114
GENERAL DYNAMICS CORP COM	207,736	207,736
GENERAL DYNAMICS CORP COM	425,339	425,339
GENUINE PARTS CO COM	302,207	302,207
GIBRALTAR INDS INC COM	74,004	74,004
GLACIER BANCORP INC NEW COM	90,119	90,119
GREEN PLAINS INC COM STK	66,883	66,883
HAEMONETICS CORP MASS COM	46,432	46,432
HARMONIC INC COM	58,380	58,380
HOME DEPOT INC COM	514,280	514,280
HUB GROUP INC CL A CL A	66,840	66,840
HUNTSMAN CORP COM STK	59,885	59,885
INGEVITY CORP COM	59,875	59,875
INTERNATIONAL SEAWAYS INC INTERNATIONAL	93,143	93,143
INTUIT COM	605,654	605,654
INTUITIVE SURGICAL INC COM NEW STK	542,138	542,138
IRONWOOD PHARMACEUTICALS INC COM CL A	80,480	80,480
JOHNSON & JOHNSON COM USD1	421,317	421,317
JOHNSON CTLS INTL PLC COM	328,663	328,663
JPMORGAN CHASE & CO COM	457,739	457,739
KEMPER CORP DEL COM	46,626	46,626

KIRBY CORP COM	48,972	48,972
KONTOOR BRANDS INC	66,228	66,228
KORN FERRY COM	51,813	51,813
KULICKE & SOFFA INDS INC COM	67,853	67,853
LADDER CAP CORP CL A CL A	57,193	57,193
LIGHT & WONDER INC COM	65,770	65,770
LIONS GATE ENTMT CORP CL B	39,639	39,639
LIVANOVA PLC ORD	78,438	78,438
LOCKHEED MARTIN CORP COM	196,253	196,253
LOCKHEED MARTIN CORP COM	294,606	294,606
LXP INDUSTRIAL TRUST COM	77,723	77,723
MADDEN STEVEN LTD COM	77,868	77,868
MAGNITE INC COM	51,183	51,183
MARRIOTT VACATIONS WORLDWIDE CORP COM	59,423	59,423
MASTERCARD INC CL A	576,642	576,642
MATADOR RES CO COM	86,598	86,598
MC DONALDS CORP COM	475,009	475,009
MERCK & CO INC NEW COM	425,287	425,287
META PLATFORMS INC COM	749,687	749,687
MGIC INVT CORP WIS COM	78,163	78,163
MICROSOFT CORP COM	696,802	696,802
MICROSOFT CORP COM	1,320,276	1,320,276
MKS INSTRS INC COM	72,215	72,215
MODINE MFG CO COM STK	74,864	74,864
MOOG INC CL A	95,120	95,120
MURPHY OIL CORP COM	85,064	85,064
NATL FUEL GAS CO COM	54,886	54,886
NETFLIX INC COM STK	178,198	178,198
NORDSTROM INC COM	84,150	84,150
NORTHWEST BANCSHARES INC MD COM	68,890	68,890
NORTHWESTERN ENERGY GROUP INC	73,841	73,841
NVIDIA CORP COM	965,679	965,679
O REILLY AUTOMOTIVE INC NEW	399,984	399,984
ONE GAS INC COM	65,950	65,950
PAC PREMIER BANCORP COM	80,169	80,169
PATTERSON COS INC COM	54,453	54,453
PEPSICO INC COM	444,981	444,981
PEPSICO INC COM	1,127,020	1,127,020

PEPSICO INC COM	1,137,928	1,137,928
PERMIAN RES CORP CL A	98,804	98,804
PERRIGO COMPANY LIMITED COM	42,864	42,864
PFIZER INC COM	131,110	131,110
PHILIP MORRIS INTL COM STK	404,544	404,544
PLEXUS CORP COM	57,093	57,093
PORTLAND GENERAL ELECTRIC CO COM NEW COMNEW	79,052	79,052
PPG IND INC COM	2,183,430	2,183,430
PRESTIGE CONSUMER HEALTHCARE INC COM	64,342	64,342
PRIMERICA INC COM	58,436	58,436
PROCTER & GAMBLE COM NPV	1,025,780	1,025,780
PROGRESSIVE CORP OH COM	161,510	161,510
PROSPERITY BANCSHARES INC COM	43,889	43,889
PVH CORP COM USD1	83,652	83,652
QUALCOMM INC COM	506,205	506,205
RLI CORP COM	46,725	46,725
RYDER SYS INC COM	64,088	64,088
SABRA HEALTH CARE REIT INC COM	66,441	66,441
SALLY BEAUTY HLDGS INC COM STK USD0.01	61,951	61,951
SANMINA CORP COM	69,401	69,401
SCHLUMBERGER LTD COM COM	167,933	167,933
SELECT MED HLDGS CORP COM	65,213	65,213
SERVICENOW INC COM USD0.001	717,794	717,794
SHERWIN-WILLIAMS CO COM	325,624	325,624
SIMPLY GOOD FOODS CO COM	52,628	52,628
SITE CENTERS CORP	84,438	84,438
SKYWARD SPECIALTY INS GROUP INC COM	55,868	55,868
SOUTHSTATE CORP COM	108,265	108,265
SPIRE INC COM	64,397	64,397
STAG INDL INC COM	46,759	46,759
STIFEL FINL CORP COM	53,591	53,591
SUMMIT HOTEL PROPERTIES INC COM	47,436	47,436
SUMMIT MATLS INC CL A CL A	76,228	76,228
SUPERNUS PHARMACEUTICALS INC COM STK	56,346	56,346
SYNAPTICS INC COM	79,057	79,057
SYNOPSYS INC COM	364.041	364.041

SYNOVUS FINL CORP COM NEW COM NEW	59,939	59,939
TERADATA CORP DEL COM STK	70,486	70,486
TEREX CORP NEW COM	59,299	59,299
TESLA INC COM USD0.001	349,114	349,114
TEXAS INSTRUMENTS INC COM	269,327	269,327
THE TRADE DESK INC COM CL A COM CL A	500,842	500,842
TREEHOUSE FOODS INC COM	44,766	44,766
TRONOX HOLDINGS PLC ORD USD0.01	53,114	53,114
UBER TECHNOLOGIES INC COM USD0.00001	172,088	172,088
UFP INDUSTRIES INC COM USD1.00	98,055	98,055
UNITED PARCEL SVC INC CL B	390,245	390,245
UNITED RENTALS INC COM	396,233	396,233
UNITEDHEALTH GROUP INC COM	392,747	392,747
VAL NATL BANCORP COM	99,130	99,130
VALMONT INDS INC COM	74,256	74,256
VEECO INSTRS INC DEL COM	66,342	66,342
VERIS RESIDENTIAL INC COM STK USD0.01	49,848	49,848
VERITEX HLDGS INC COM	68,996	68,996
VERIZON COMMUNICATIONS COM	305,182	305,182
VERTEX PHARMACEUTICALS INC COM	458,972	458,972
VERTIV HOLDINGS LLC COM USD0.0001	380,061	380,061
VESTIS CORP COM	77,182	77,182
VIRTUS INVT PARTNERS INC COM	73,012	73,012
VISTEON CORP COM NEW COM NEW	63,824	63,824
WABASH NATL CORP COM	53,495	53,495
WERNER ENTERPRISES INC COM	57,920	57,920

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ObjectID: 202402979349100620 - Submission: 2024-10-23

TIN: 34-6598971

TY 2023 IRS 990 e-File Render**Name:** BURTON D MORGAN FOUNDATION INC**EIN:** 34-6598971

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
COMMONFUND CAPITAL NATURAL RESOURCES FUND IX	FMV	3,637,651	3,637,651
ELEUTHERA PROPERTIES LTD.	FMV	330,464	330,464
HARRISON STREET CORE PROPERTY FUND LP	FMV	5,275,452	5,275,452
NEO CAPITAL FUND LP	FMV	123,914	123,914
RIVERSIDE MICRO CAP FUND IV - B	FMV	4,171,279	4,171,279
RIVERSIDE MICRO CAP FUND IV-A	FMV	6,926,596	6,926,596
TRG FORESTRY FUND 8-B LP	FMV	7,785	7,785
SPDR S&P 500 ETF	FMV	11,988,744	11,988,744
VANGUARD INSTL INDEX FUND	FMV	34,944,735	34,944,735
FRANKLIN SMALL CAP BRW FUND	FMV	5,838,424	5,838,424
VANGUARD INDEX TR MID CAP ADMIRAL FUND	FMV	14,907,032	14,907,032
BAILLIE GIFFORD LONG- TERM GLOBAL GROWTH FUND	FMV	12,830,935	12,830,935
H.I.G. WHITEHORSE OFFSHORE LOAN FEEDER FUND	FMV	2,759,304	2,759,304
CARLSON CAPITAL BLACK DIAMOND ARBITRAGE FUND	FMV	8,203,962	8,203,962
H.I.G. WHITEHORSE LUXEMBOURG LOAN FEEDER FUND	FMV	13,292,343	13,292,343

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ObjectID: 202402979349100620 - Submission: 2024-10-23

TIN: 34-6598971

TY 2023 IRS 990 e-File Render**Name:** BURTON D MORGAN FOUNDATION INC**EIN:** 34-6598971

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BALDWIN HOUSE	14,493	5,827	8,666	
BALDWIN HOUSE	47,482	19,092	28,390	
WELTY RENOVATIONS - BALDWIN HOUSE	35,000	14,073	20,927	
CONSTRUCTION COSTS	128,697	51,747	76,950	
BALDWIN HOUSE - LANDSCAPING	5,588	5,588	0	
LANDSCAPING - BH	11,579	11,579	0	
CONSTRUCTION COSTS	21,730	8,737	12,993	
BALDWIN HOUSE - ARCH SERVICES	455	183	272	
WATER METER	675	675	0	
LANDSCAPE ARCH DESIGN - BH	1,125	1,125	0	
ARCH SERVICES	982	395	587	
BALDWIN HOUSE	324	130	194	
CONSTRUCTION COSTS	17,521	7,045	10,476	
DOOR, HARDWARE AND INSTALLATION	2,234	884	1,350	
BH THRESHOLD BASEMENT	455	177	278	
EXTERIOR LAMPS AND WIRING	731	731	0	
BALDWIN HOUSE EXTERIOR PAINTING	1,710	656	1,054	
IMPROVEMENTS	1,652	592	1,060	
NEW FUNERAL DOOR	3,720	775	2,945	
EXTERIOR LIGHTS	1,039	1,039	0	
PARKING LOT SIGNS	1,086	1,086	0	
BUILDING - PURCHASE AND COSTS	798,176	345,876	452,300	
ARCHITECT FEES	120,903	52,391	68,512	
ARCHITECT FEES	75,387	32,668	42,719	

BATH SPECIALITIES (WELTY - ITEM NO. 9)	4,031	4,031	0	
GRADING & EARTHWORK (WELTY - ITEM NO. 14)	141,413	141,413	0	
SITE UTILITIES (WELTY - ITEM NO. 15)	17,573	17,573	0	
CONCRETE PAVING (WELTY ITEM NO. 21/22)	14,757	14,757	0	
FLOORING (WELTY ITEM NO. 35/CO9/CO17)	74,670	74,670	0	
FIRE EXTINGUISHERS (WELTY ITEM NO. 38/39)	758	758	0	
WINDOW TREATMENTS (WELTY ITEM NO. 41)	9,718	9,718	0	
SECURITY SYSTEM (WELTY ITEM NO. 49/CO18)	17,876	17,876	0	
TOILET SEAT COVERS (WELTY ITEM NO. CO3)	201	201	0	
SITE CONCRETE (WELTY ITEM NO. CO6)	17,040	17,040	0	
CONCRETE EXTRAS (WELTY ITEM NO. CO11)	3,502	3,502	0	
MIRRORS (WELTY ITEM NO. CO21/CO25)	939	939	0	
RENOVATIONS 22 AURORA ST.	1,796,368	778,426	1,017,942	
KITCHEN BACKSPLASH	1,486	1,486	0	
SIGNAGE - LOBBY & RESTROOM	6,266	6,266	0	
ARCHITECTURAL SERVICES	12,090	4,987	7,103	
REAR STAIRWELL DOOR	2,933	1,173	1,760	
BASEMENT DEHUMIDIFIER	2,059	806	1,253	
SEWAGE PUMP - BASEMENT	1,563	612	951	

TELEPHONE LINES	2,562	982	1,580	
ROOF RESTORATION / SIDING REPLACEMENT	10,900	10,598	302	
BLDG FINAL PAYMENT	5,000	1,625	3,375	
PLASTIC VAPOR BARRIER FOR CRAWL SPACE	1,100	776	324	
HVAC EXPANSION TANK	2,150	1,529	621	
HVAC COMPRESSOR	3,063	1,923	1,140	
PRISM II SOFTWARE CONVERSION	1,913	1,466	447	
HVAC ZONE CONTROLLER ZONE 5	1,304	989	315	
VIDEO INTERCOM DOOR SYSTEM	3,490	1,474	2,016	
HOT WATER TANK - BASEMENT	2,051	1,111	940	
HEAT EXCHANGER UNIT	5,100	1,700	3,400	
GARDENS LIMITED-LANDSCAPING	11,772	11,772	0	
GARDENS LIMITED-LANDSCAPING	10,365	10,365	0	
GARDENS LIMITED-LANDSCAPING	23,819	23,819	0	
GARDENS LIMITED-LANDSCAPING	3,850	3,850	0	
GARDENS LIMITED-LANDSCAPING	2,460	2,460	0	
GARDENS LIMITED-LANDSCAPING	1,489	1,489	0	
GARDENS LIMITED	18,810	18,810	0	
WROUGHT IRON FENCE AND MISC	6,666	6,666	0	
INSTALL CUT STONE IN FOUNTAIN	2,552	2,552	0	
2 BENCHES IN COURTYARD	1,128	1,128	0	
SANDSTONE STEPS IN COURTYARD	4,220	2,414	1,806	
SUNCREST GARDENS - FRONT BED LANDSCAPING	6,876	3,358	3,518	
LANDSCAPE PLANTS	1,884	1,162	722	

COURTYARD STONEWORK AND CONCRETE PLANTER	2,542	226	2,316	
COMPUTER MONITOR - (SKL -2)	169	169	0	
BROMELKAMP EGRANT SOFTWARE MODULE	11,313	11,313	0	
SKL - MONITOR	151	151	0	
GMD MONITOR	139	139	0	
FIRST PEARL LICENSE (4)	1,220	1,220	0	
TRIPP-LITE RACKMOUNT KVM CONSOLE	679	679	0	
WIRELESS UPGRADE	3,797	3,797	0	
BACKUP ISP	1,199	1,199	0	
IPAD AIR 2 - DDH	750	750	0	
SERVER SWITCH UPGRADE	11,466	11,466	0	
IPAD AIR 3 DMG	678	678	0	
NEOLAUNCHNET SOFTWARE PLATFORM	63,960	63,960	0	
DELL LATTITUDE LAPTOP SPARE	989	989	0	
CISCO MERAKI FIREWALL UPGRADE	3,620	3,620	0	
D. GRIGGS MONITORS (2)	358	358	0	
AKOYA GRANTS MGMT PLATFORM	5,715	5,715	0	
EGRANT BUILDER PLATFORM	2,500	2,500	0	
VUB LAPTOP LATITUDE 5580	1,923	1,923	0	
ADD'L CONFIGURATION TO NLN PLATFORM	1,950	1,723	227	
ADDN TO NLN PLATFORM FOR JCU	1,125	956	169	
ADD'L CONFIGURATION TO AKOYA PLATFORM	4,781	4,781	0	
ADD'L CONFIGURATION TO EGRANT PLATFORM	960	960	0	
2ND ADD'L	5.325	5.325	0	

CONFIGURATION TO AKOYA PLATFORM				
LATITUDE E5590 LAPTOP EBW & SETUP	2,120	2,120	0	
OPTIPLEX 5060 DESKTOP DMG & SET UP	1,580	1,580	0	
ACCESS UPGRADE TO DOORS.NET	2,083	2,083	0	
LATITUDE 5500 LAPTOP AKE	1,667	1,574	93	
LATITUDE 5500 LAPTOP GMD	1,667	1,574	93	
LATITUDE 5500 LAPTOP DDH	1,667	1,574	93	
DELL LATITUDE 5500 SVR LAPTOP DMG	1,709	1,424	285	
SHAREPOINT SERVER MIGRATION	10,163	3,457	6,706	
LATITUDE 5520 LAPTOP VUB	1,709	1,709	0	
LATITUDE 5520 LAPTOP INNOVATION RM	1,704	1,704	0	
OPTIPLEX DESKTOP TOWER - SNP	895	448	447	
DELL LATITUDE 5520 LAPTOP - JMS	1,885	942	943	
DELL LATITUDE 5520 LAPTOP - EB	1,885	942	943	
SHAREPOINT MIGRATION PHASE II	4,840	1,130	3,710	
LATITUDE 5531 LAPTOP DJH	2,544	424	2,120	
OPTIPLEX 3000 DESKTOP JMS	920	154	766	
LAPTOP 5530 AKE	1,820	506	1,314	
LAPTOP 5530 GMD	1,820	506	1,314	
DESKTOP 5000 DMG	971	270	701	
DELL LATITUDE 5540 LAPTOP SNP	1,576	88	1,488	
DELL LATITUDE 5540 LAPTOP MBM	1,576	88	1,488	
DELL LATITUDE 5540 LAPTOP TBD	1,576	88	1,488	
NETWORK UPGRADE	2,550	0	2,550	
FURNITURE	1.925	1.925	0	

FURN	3,844	3,844	0	
CHAIRS-FOREMOST	1,394	1,394	0	
FILE CABINETS-FOREMOST	1,003	1,003	0	
FILE CABINET	1,306	1,306	0	
DESK - BREWSTER STROUD	952	952	0	
FURNITURE	1,740	1,740	0	
FILE CABINET	1,306	1,306	0	
PORTRAIT 30 X 24	3,400	3,400	0	
LATERAL FILE	1,494	1,494	0	
FIREKING FILE	1,574	1,574	0	
FURNITURE	799	799	0	
FURNITURE	10,757	10,757	0	
CREDENZA	220	220	0	
OFFICE FURNISHINGS	404	404	0	
FILE CABINET	886	886	0	
PRINTER STAND/STORAGE	868	868	0	
DDH TABLE	536	536	0	
DDH TABLE/DESK	535	535	0	
BONFOEY - ARTWORK	4,440	4,440	0	
BDM PORTRAIT	3,400	3,400	0	
WINDSOR CHAIRS	5,023	5,023	0	
MAINE COTTAGE	453	453	0	
INTERSTATE	4,726	4,726	0	
FURNITURE	61,600	61,600	0	
CHEST	2,100	2,100	0	
MAPLE SERVER	750	750	0	
ROCKWELL PRINT	7,050	7,050	0	
CREDENZA	1,389	1,389	0	
FURNITURE	1,184	1,184	0	
FRAMING	1,414	1,414	0	
FURNITURE	12,059	12,059	0	
FURNITURE	87,605	87,605	0	
ROCKWELL PRINT-DOWNHILL RACER	3,850	3,850	0	
WARWICK COMMUNICATIONS	53,509	53,509	0	

ROSE UPHOLSTRY - CHAIR	870	870	0	
BOARDROOM CREDENZA	1,437	1,437	0	
BLUE SIDEBBOARD - KITCHEN	3,812	3,812	0	
FRAMING DENISON	450	450	0	
FRAMING DOWNHILL RACER	527	527	0	
ROCKWELL PRINT EXTRA GOOD BOYS & GIRLS	10,050	10,050	0	
UPHOLSTERY MR. MORGAN'S CHAIRS	1,700	1,700	0	
FRAMING ROCKWELL SANTA	1,301	1,301	0	
FRAMING PURDUE	905	905	0	
REPROGRAMMING BOARD ROOM EQUIPMENT	3,900	3,900	0	
JCVN OFFICER CHAIR	1,453	1,453	0	
DMG OFFICE CHAIR	1,453	1,453	0	
MEE CREDENZA	2,169	2,169	0	
BDM PORTRAIT-MITSUNO ISHII REEDY	6,500	6,500	0	
FRAMING LEWIS & REEDY	415	415	0	
CAD DOCUMENTATION	900	900	0	
HUANG ARTWORK & FRAMING	262	262	0	
CHUCK KOVACIC ARTWORK & FRAMING	223	223	0	
NORMAN ROCKWELL "AMERICA MARCHES FORWARD"	4,050	4,050	0	
FRAMING "AMERICA MARCHES FORWARD"	594	594	0	
2 DRAWER LATERAL FIRE KING FILE	1,395	1,395	0	
2 DRAWER LATERAL FIRE KING FILE	1,395	1,395	0	
CHENOWETH PORTRAIT	1,262	1,262	0	
NORMAN ROCKWELL	6,500	6,500	0	

NORMAN ROCKWELL "HIGH DIVE"	5,000	5,000	0	
FRAMING "HIGH DIVE"	1,890	1,890	0	
NORMAN ROCKWELL "COUNTY AGRICULTURE AGENT"	6,000	6,000	0	
FRAME FOR ROCKWELL - COUNTY AG	1,673	1,673	0	
FOUNTAIN PAINTING AND FRAM	900	900	0	
BDFM BLDG PAINTING "ARTWORK"	550	550	0	
SHADOWBOX FOR GLIDER SUIT	2,575	2,575	0	
GMD TASK CHAIR	526	526	0	
PHONE SYSTEM EQUIP - ROUTER & TRUNK	1,404	1,252	152	
INNOVATION RM FURNISHINGS (DOWN PYMT)	14,503	11,240	3,263	
P. KELLEY 38TH STREET PAINTING	6,000	4,800	1,200	
BDM PORTRAIT (FARR)	3,400	2,380	1,020	
ARTWORK "PLAYGROUND" HARRIET MORORE BALLARD	6,000	4,650	1,350	
WIRELESS POLYCOM PHONE	1,450	1,450	0	
INNOVATION ROOM FURNISHINGS - 2ND PYMT	13,068	10,128	2,940	
SECURITY AIRPHONE - INNOVATION RM	965	748	217	
GAULT PORTRAIT	1,000	733	267	
INNOVATION FURNITURE FINAL PAYMENT	1,435	1,064	371	
MODULAR PANELS - LIBRARY/OFFICE	1,650	1,210	440	
FRAME - GAULT PORTRAIT	441	323	118	
FRAME FOR BDM PORTRAIT (FARR)	565	396	169	
DIGITAL STORAGE	3,240	1,001	1,260	

DIGITAL SIGNAGE SYSTEM	5,349	1,981	1,308	
TOSHIBA PHONE SYSTEM AND INSTALLATION	15,747	9,580	6,167	
WORKROOM A/C UNIT AND ROOF CONDENSER	9,760	4,717	5,043	
SECURITY CAMERA UPGRADE	3,975	1,889	2,086	
CELLULAR COMMUNICATOR FOR SECURITY SYSTEM	1,260	599	661	
HERMAN MILLER EMBODY CHAIR JMS	935	343	592	
BARCO WIRELESS PRESENTATION SYSTEM INNOV RM	4,054	1,452	2,602	
ERBAUGH PORTRAIT & FRAMING	1,659	553	1,106	
DEHUMIDIFIER FOR VAULT ROOM IN BASEMENT	3,920	1,241	2,679	
BOILER PUMPS AND MOTORS	4,041	561	3,480	
CPW5V-22 SEWER EJECTION PUMP	2,286	254	2,032	
BOARDROOM AND INNOV RM AV EQUIPMENT	33,671	10,101	23,570	
BOARDROOM MEETING CAMERA	1,636	436	1,200	
DDH PORTRAIT AND FRAMING	2,053	137	1,916	
ARCHITECT FEES	24,039	4,658	19,381	
TECH DESIGN & INSTALL	4,811	932	3,879	
REMODEL - RUHLIN PYMT 1	36,011	6,977	29,034	
REMODEL RUHLIN PAYMENT 2	65,578	12,705	52,873	
DATA AND PHONE CABLING	1,264	245	1,019	
RUHLIN REMODEL - PAYMENT 3	70,408	13,641	56,767	
RUHLIN REMODEL - FINAL PAYMENT	16,774	3,250	13,524	
YIPPEE PLATFORM V.1	199,810	104,535	95,275	

YIPPEE PLATFORM V.2	163,970	32,082	131,888	
YIPPEE PLATFORM V.3	160,413	0	160,413	

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TY 2023 IRS 990 e-File Render

Name: BURTON D MORGAN FOUNDATION INC

EIN: 34-6598971

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	4,580	600		3,259

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TY 2023 IRS 990 e-File Render

Name: BURTON D MORGAN FOUNDATION INC

EIN: 34-6598971

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
457(B) PLAN INVESTMENTS	227,667	110,058	110,058

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TY 2023 IRS 990 e-File Render

Name: BURTON D MORGAN FOUNDATION INC

EIN: 34-6598971

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DIRECT PROGRAM EXPENSE	969,447	0		969,447
OFFICE SERVICES	81,951	10,744		90,115
MAINTENANCE	50,398	6,607		44,404
INSURANCE	37,164	4,872		32,292
DUES & SUBSCRIPTIONS	17,174	2,252		14,710
OFFICE SUPPLIES	8,755	1,148		7,607
MISCELLANEOUS EXPENSE	1,777	233		1,512
WEBSITE	2,050	269		1,781

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TY 2023 IRS 990 e-File Render

Name: BURTON D MORGAN FOUNDATION INC

EIN: 34-6598971

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP INCOME	307,606	772,825	307,606
CLASS ACTION SETTLEMENTS	1,736	1,736	1,736
LESS: UBI ACTIVITY FROM PASSTHROUGHS		-200,593	

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TY 2023 IRS 990 e-File Render

Name: BURTON D MORGAN FOUNDATION INC

EIN: 34-6598971

Description	Amount
UNREALIZED GAINS	12,378,134

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TY 2023 IRS 990 e-File Render

Name: BURTON D MORGAN FOUNDATION INC

EIN: 34-6598971

Description	Beginning of Year - Book Value	End of Year - Book Value
457(B) PLAN LIABILITIES	227,667	110,058

efile Public Visual Render | **ObjectId: 202402979349100620 - Submission: 2024-10-23** | **TIN: 34-6598971**

TY 2023 IRS 990 e-File Render

Name: BURTON D MORGAN FOUNDATION INC

EIN: 34-6598971

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTING	97,285	12,754		91,352
CUSTODIAL FEES	32,731	32,731		0
HARRISON STREET FEES	63,679	0		0
HIG FEES - 2016	82,487	0		0
HIG FEES - 2020 (LUXEMBOURG)	557,527	0		0
INV MGT FEES	263,463	263,463		0
INVESTMENT CONSULTING FEES	105,788	105,788		0

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TIN: 34-6598971

TY 2023 IRS 990 e-File Render

Name: BURTON D MORGAN FOUNDATION INC
EIN: 34-6598971

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	175,000	0		0