

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

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For calendar year 2022, or tax year beginning 04-01-2022, and ending 03-31-2023

Name of foundation HIMAN BROWN CHARITABLE TRUST
A Employer identification number 27-6669056
Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
B Telephone number (see instructions) (212) 421-4100
City or town, state or province, country, and ZIP or foreign postal code
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
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 94,484,547
J Accounting method: Cash, Accrual, Other (specify)
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))

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include Contributions, gifts, grants, etc., Interest on savings, Dividends, Net gain or loss, Capital gain, Other income, Operating and Administrative Expenses, Total expenses and disbursements, and Excess of revenue over expenses and disbursements.

**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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	1,665,318	768,749	768,749
	<b>2</b> Savings and temporary cash investments . . . . .	7,326,891	2,167,201	2,167,201
	<b>3</b> Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)	612,324	770,807	757,040
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	53,399,357	50,064,063	67,136,902
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	7,321,868	10,569,953	10,257,442
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .	14,639,992	13,893,138	13,397,213
	<b>14</b> Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)				
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	84,965,750	78,233,911	94,484,547	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	2,549	470	
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue. . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons . . . . .			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	2,549	470	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .			
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .	0	0	
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .	0	0	
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds . . . . .	84,963,201	78,233,441	
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	84,963,201	78,233,441		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	84,965,750	78,233,911		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	84,963,201
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-6,729,760
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	0
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	78,233,441
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	0
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	<b>6</b>	78,233,441

**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.)
<b>1 a</b> FIDELITY 265551			
<b>b</b> FIDELITY 239563			
<b>c</b> FIDELITY 362223			
<b>d</b> MERRILL LYNCH			
<b>e</b> MORGAN STANLEY 761-143703			
MORGAN STANLEY 442-163655			
OPPPENHEIMER			
CAPITAL GAINS DIVIDENDS	P		

(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)
<b>a</b> 2,616,969		3,222,271	-605,302
<b>b</b> 423,114		420,594	2,520
<b>c</b> 657,868		670,804	-12,936
<b>d</b> 3,393,787		3,429,437	-35,650
<b>e</b> 6,293,088		6,691,071	-397,983
96,274		131,399	-35,125
1,775,312		2,228,758	-453,446
133,615			133,615

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) 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	
<b>a</b>			-605,302
<b>b</b>			2,520
<b>c</b>			-12,936
<b>d</b>			-35,650
<b>e</b>			-397,983
			-35,125
			-453,446
			133,615

Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	<b>2</b>	-1,404,307
<b>3</b> 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	}	<b>3</b>	

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

Table with 11 rows for excise tax calculation. Includes fields for exempt foundations, tax under section 511, credits/payments, and total tax due. Values include 32,497, 114,000, 153, 81,350, and 81,350.

Part VI-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, question text, and Yes/No response boxes. Questions cover political activities, Form 1120-POL filing, and foundation requirements.

Part VI-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A
14 The books are in care of RICHARD L KAY ESQ Telephone no. (212) 421-4100 Located at PRYOR CASHMAN 7 TIMES SQUARE NEW YORK NY 10036 ZIP+4
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 2022, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign

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.

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?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(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)?
(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.)
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
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 2022?
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 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?. 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.)
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?
b If "Yes," did it have excess business holdings in 2022 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2022.)
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2022?

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

- 5a During the year did the foundation pay or incur any amount to:
(1) Carry on propaganda, or otherwise attempt to influence legislation...
(2) Influence the outcome of any specific public election...
(3) Provide a grant to an individual for travel, study, or other similar purposes...
(4) Provide a grant to an organization other than a charitable, etc., organization...
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes...
b If any answer is "Yes" to 5a(1)-(5); did any of the transactions fail to qualify under the exceptions...
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...
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
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?

Table with 3 columns: Question ID, Yes, No. Rows include 5a(1) through 8.

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

Table with 5 columns: (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. Includes entry for RICHARD L KAY.

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

Table with 5 columns: (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. First row contains NONE.

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
MICHAEL B KRAMER & ASSOC 488 MADISON AVE STE 1120 NEW YORK, NY 10022	LEGAL REPRESENTATION	463,793
GREENFIELD STEIN & SENIOR LLP 600 3RD AVE NEW YORK, NY 10016	LEGAL REPRESENTATION	419,559
PRYOR CASHMAN 7 TIMES SQUARE NEW YORK, NY 10036	LEGAL REPRESENTATION	256,406
MIAMI PHILANTHROPIC CONSULTING INC 2301 LAGUNA CIRCLE 803 NORTH MIAMI, FL 33181	PHILANTHROPIC ADVISOR	200,000
SONTAG ADVISORY LLC 261 MADISON AVENUE 14TH FL NEW YORK, NY 10016	INVESTMENT ADVISORY	101,537

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

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

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

	Expenses
<b>1</b> NONE	0
<b>2</b>	
<b>3</b>	
<b>4</b>	

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

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

	Amount
<b>1</b> NONE	0
<b>2</b>	
<b>3</b> All other program-related investments. See instructions.	0
<b>Total.</b> Add lines 1 through 3 . . . . .	0



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	80,246,015
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	5,127,703
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	9,370,360
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	94,744,078
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	94,744,078
<b>4</b>	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	1,421,161
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. . . . .	<b>5</b>	93,322,917
<b>6</b>	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5. . . . .	<b>6</b>	4,666,146

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

<b>1</b>	Minimum investment return from Part IX, line 6. . . . .	<b>1</b>	4,666,146
<b>2a</b>	Tax on investment income for 2022 from Part V, line 5. . . . .	<b>2a</b>	32,497
<b>b</b>	Income tax for 2022. (This does not include the tax from Part V.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	32,497
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	4,633,649
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	4,633,649
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1. . . . .	<b>7</b>	4,633,649

**Part XI Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26. . . . .	<b>1a</b>	7,549,272
<b>b</b>	Program-related investments—total from Part VIII-B	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4. . . . .	<b>4</b>	7,549,272

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

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
<b>1</b> Distributable amount for 2022 from Part X, line 7				4,633,649
<b>2</b> Undistributed income, if any, as of the end of 2022:				
<b>a</b> Enter amount for 2021 only. . . . .			0	
<b>b</b> Total for prior years: 20____, 20____, 20____		0		
<b>3</b> Excess distributions carryover, if any, to 2022:				
<b>a</b> From 2017. . . . .	758,292			
<b>b</b> From 2018. . . . .	371,811			
<b>c</b> From 2019. . . . .	1,573,890			
<b>d</b> From 2020. . . . .	776,593			
<b>e</b> From 2021. . . . .	426,415			
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	3,907,001			
<b>4</b> Qualifying distributions for 2022 from Part XI, line 4: ▶ \$ _____ 7,549,272				
<b>a</b> Applied to 2021, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2022 distributable amount				4,633,649
<b>e</b> Remaining amount distributed out of corpus	2,915,623			
<b>5</b> Excess distributions carryover applied to 2022. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	6,822,624			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b. . . . .		0		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions. . . . .		0		
<b>e</b> Undistributed income for 2021. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). . . . .	0			
<b>8</b> Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions)	758,292			
<b>9</b> <b>Excess distributions carryover to 2023.</b> Subtract lines 7 and 8 from line 6a	6,064,332			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2018	371,811			
<b>b</b> Excess from 2019	1,573,890			
<b>c</b> Excess from 2020. . . . .	776,593			
<b>d</b> Excess from 2021	426,415			
<b>e</b> Excess from 2022	2,915,623			

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

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

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 . . . . .

Table with columns: Tax year (a) 2022, (b) 2021, (c) 2020, (d) 2019, (e) Total. Rows include 2a, 2b, 2c, 2d, 2e, 3a, 3b, 3c.

b 85% (0.85) of line 2a

c Qualifying distributions from Part XI, line 4 for each year listed . . . . .

d Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test—enter: (1) Value of all assets . . . . . (2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed . . . . .

c "Support" alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . . (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . . (3) Largest amount of support from an exempt organization (4) Gross investment income

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

1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

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 email address of the person to whom applications should be addressed:

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

c Any submission deadlines:

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

**Part** 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)				
<b>a</b> <i>Paid during the year</i> KEY BISCAVNE COMMUNITY FOUNDATION 88 W MCINTYRE STREET SUITE 200 KEY BISCAVNE,FL 33149	N A		GENERAL	400,000
UNIVERSITY OF MICHIGAN - LAW SCHOOL 625 S STATE ST ANN ARBOR,MI 48109	N A		EDUCATIONAL	1,200,000
NEW YORK PHILHARMONIC DAVID GEFFEN HALL10 LINCOLN CENTER PLAZA NEW YORK,NY 10023	N A		GENERAL	100,000
FUND FOR THE AGED (JEWISH HOME & HOSPITAL FOUNDATION) 120 W 106TH STREET NEW YORK,NY 10025	N A		GENERAL	50,000
UJA FEDERATION OF NY INC 130 EAST 59TH STREET NEW YORK,NY 10022	N A		GENERAL	459,000
THE ALLEN-STEVENSON SCHOOL 132 EAST 78TH STREET NEW YORK,NY 100750381	N A		EDUCATIONAL	150,000
THE DOE FUND 232 EAST 84TH STREET NEW YORK,NY 10028	N A		GENERAL	45,000
PLANNED PARENTHOOD OF SOUTH FLORIDA 2300 N FLORIDA MANGO ROAD WEST PALM BEACH,FL 33409	N A		EDUCATIONAL	50,000
LEADERSHIP ENTERPRISE FOR A DIVERSE AMERICA (LEDA) 315 WEST 39TH STREET SUITE 607 NEW YORK,NY 10018	N A		EDUCATIONAL	10,000
GREATER CLEVELAND VOLUNTEERS 4415 EUCLID AVENUE SUITE 200 CLEVELAND,OH 44103	N A		GENERAL	5,000
BRANCHES INC 11500 NW 12TH AVENUE MIAMI,FL 33168	N A		EDUCATIONAL	100,050
BIG BROTHERS & BIG SISTERS OF NY 40 RECTOR STREET 11TH FLOOR NEW YORK,NY 10006	N A		GENERAL	10,000
GREATER MIAMI JEWISH FEDERATION STANLEY C MYERS BUILDING MIAMI,FL 331373279	N A		GENERAL	75,000
ADRIENNE ARSHT CENTER FOUNDATION INC (AILEY CAMP) 1300 BISCAVNE BLVD MIAMI,FL 33132	N A		GENERAL	100,000

REPAIR THE WORLD INC 1460 BROADWAY NEW YORK, NY 10036	N A		GENERAL	200,000
BREAKTHROUGH MIAMI INC 3250 SW 3RD AVENUE 6TH FLOOR MIAMI, FL 33129	N A		EDUCATIONAL	100,000
GREATER MIAMI & SOUTH FLORIDA YOUTH AND COMMUNITY INC 3581 SW 68TH TER MIRAMAR, FL 33023	N A		GENERAL	25,000
CORNELL UNIVERSITY 130 E SENECA STREET SUITE 400 ITHACA, NY 14850	N A		EDUCATIONAL	510,000
CROHN'S & COLITIS FOUNDATION OF AMERICA 733 THIRD AVENUE SUITE 510 NEW YORK, NY 10017	N A		MEDICAL	26,000
NORWOOD SCHOOL INC 8821 RIVER ROAD BETHESDA, MD 20817	N A		EDUCATIONAL	20,000
CORNELL UNIVERSITY - CORNELL HILLEL 130 E SENECA STREET SUITE 400 ITHACA, NY 14850	N A		EDUCATIONAL	55,000
HILLEL INTERNATIONAL - THE FOUNDATION FOR JEWISH CAMPUS LIFE 800 EIGHTH STREET NW WASHINGTON, DC 20001	N A		EDUCATIONAL	25,000
CENTRAL SYNAGOGUE 652 LEXINGTON AVENUE NEW YORK, NY 10022	N A		GENERAL	28,700
CENTRAL PARK CONSERVANCY INC 14 E 60TH STREET 8TH FL NEW YORK, NY 10022	N A		GENERAL	50,000
GOD'S LOVE WE DELIVER 166 AVENUE OF THE AMERICAS NEW YORK, NY 10013	N A		GENERAL	150,000
ST JUDE CHILDREN'S RESEARCH HOSPITAL 501 ST JUDE PLACE MEMPHIS, TN 38105	N A		MEDICAL	25,000
YORKVILLE YOUTH ATHLETIC ASSOCIATION INC 415 E 90TH STREET NEW YORK, NY 10128	N A		GENERAL	25,000
ANTI DEFAMATION LEAGUE 605 3RD AVE NEW YORK, NY 10158	N A		GENERAL	100,000
NEW YORK PRESBYTERIAN FUND INC 525 EAST 68TH STREET BOX 156 NEW YORK, NY 10065	N A		MEDICAL	150,000
ISLAND HARVEST 15 GRUMMAN ROAD WEST SUITE 1450 BETHPAGE, NY 11714	N A		GENERAL	15,000
	N A		GENERAL	25,000

METROPOLITAN OPERA ORCHESTRA COMMITTEE 30 LINCOLN CENTER PLAZA NEW YORK, NY 100236922				
HUNTER COLLEGE FOUNDATION 695 PARK AVENUE ROOM 1601E NEW YORK, NY 100655024	N A		EDUCATIONAL	50,000
SECTION 16H GROUP 323 BERGEN BLVD FAIRVIEW, NJ 07022	N A		GENERAL	25,000
MASTERVOICES INC 1441 BROADWAY SUITE 3024 NEW YORK, NY 10018	N A		GENERAL	10,000
92ND ST Y 1395 LEXINGTON AVENUE NEW YORK, NY 10128	N A		EDUCATIONAL	1,100,000
THE SIDWELL FRIENDS SCHOOL 3825 WISCONSIN AVENUE NW WASHINGTON, DC 20016	N A		EDUCATIONAL	5,000
NEW YORK GILBERT & SULLIVAN PLAYERS INC (NYGASP) 225 WEST 99TH STREET NEW YORK, NY 10025	N A		GENERAL	5,000
CARTER BURDEN NETWORK 415 EAST 73RD STREET NEW YORK, NY 10021	N A		GENERAL	25,000
AMERICAN BALLET THEATRE 890 BROADWAY THIRD FLOOR NEW YORK, NY 10003	N A		GENERAL	25,000
GLOBAL CAMPS AFRICA 11911 FREEDOM DRIVE 850 RESTON, VA 20190	N A		GENERAL	25,000
THE SCHECHTER INSTITUTES INC BOX 3566 PO BOX 8500 PHILADELPHIA, PA 19178	N A		EDUCATIONAL	20,000
LEOPOLD SCHEPP FOUNDATION 950 3RD AVENUE SUITE 3100 NEW YORK, NY 10022	N A		GENERAL	50,000
COMMUNITIES IN SCHOOLS OF THE NATIONS CAPITAL INC 1023 31ST STREET NW SUITE 510 WASHINGTON, DC 20007	N A		EDUCATIONAL	80,000
AFTER-SCHOOL ALL-STARS WASHINGTON DC 1730 RHODE ISLAND AVE NW 600 WASHINGTON, DC 20036	N A		GENERAL	150,000
FOUNDATION FOR NEW EDUCATIONAL INITIATIVES 1450 NE SECOND AVENUE SUITE 931 MIAMI, FL 33132	N A		EDUCATIONAL	3,448
MUSEUM OF MODERN ART (MOMA) 11 WEST 53RD STREET NEW YORK, NY 10019	N A		GENERAL	5,000
<b>Total</b>				<b>5,862,198</b>

▶ 3a

**b** *Approved for future payment*

Total . . . . . ▶ 3b

0

Part XV-A Analysis of Income-Producing Activities

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
5 Net rental income or (loss) from real estate:
a Debt-financed property.
b Not debt-financed property.
6 Net rental income or (loss) from personal property
7 Other investment income
8 Gain or (loss) from sales of assets other than inventory
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

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Includes rows for interest on savings (20,500), dividends (2,676,459), other investment income (52,995), and gain from sales (-1,404,307). Totals: 0, 1,345,647, 1,345,647.

12 Subtotal. Add columns (b), (d), and (e).

13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Table with 2 columns: Line No., Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes.



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

**Part XVI**

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

**a** Transfers from the reporting foundation to a noncharitable exempt organization of:

- (1) Cash. . . . .
- (2) Other assets. . . . .

**b** Other transactions:

- (1) Sales of assets to a noncharitable exempt organization. . . . .
- (2) Purchases of assets from a noncharitable exempt organization . . . . .
- (3) Rental of facilities, equipment, or other assets. . . . .
- (4) Reimbursement arrangements. . . . .
- (5) Loans or loan guarantees. . . . .
- (6) Performance of services or membership or fundraising solicitations. . . . .

**c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees. . . . .

**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.

	Yes	No
<b>1a(1)</b>		No
<b>1a(2)</b>		No
<b>1b(1)</b>		No
<b>1b(2)</b>		No
<b>1b(3)</b>		No
<b>1b(4)</b>		No
<b>1b(5)</b>		No
<b>1b(6)</b>		No
<b>1c</b>		No

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

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

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

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

**Sign Here** Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee: \_\_\_\_\_ Date: 2024-02-13 Title: \_\_\_\_\_

May the IRS discuss this return with the preparer shown below?  
See instructions.  Yes  No

<b>Paid Preparer Use Only</b>	Print/Type preparer's name BRIAN J GLOZNEK	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN P00106849
	Firm's name ▶ HERTZ HERSON CPA LLP				Firm's EIN ▶ 81-2276003
	Firm's address ▶ 575 LEXINGTON AVENUE NEW YORK, NY 10022				Phone no. (212) 686-7160

## **Additional Data**

[Return to Form](#)

**Software ID:**

**Software Version:**

**Form 990PF - Special Condition Description:**

**Special Condition Description**

# TY 2022 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	115,200	57,600		57,600

# TY 2022 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

Category	Amount
NONE	0

## TY 2022 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIDELITY INVESTMENTS - 647-239563	1,645,893	1,559,724
MORGAN STANLEY CORPORATE #761-143703	2,045,583	1,967,998
OPPENHEIMER & CO INC.	6,878,477	6,729,720

**TY 2022 IRS 990 e-File Render****Name:** HIMAN BROWN CHARITABLE TRUST**EIN:** 27-6669056

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FIDELITY INVESTMENTS - 647-265551	23,883,577	35,368,594
FIDELITY INVESTMENTS - 656-251474	1,651,015	2,245,325
FIDELITY INVESTMENTS - 656-362223	3,171,753	3,553,439
MORGAN STANLEY #761-143703	20,239,480	24,798,058
MORGAN STANLEY 052-163655-704	1,118,238	1,171,486

## TY 2022 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

**US Government Securities - End of  
Year Book Value:**

770,807

**US Government Securities - End of  
Year Fair Market Value:**

757,040

**State & Local Government  
Securities - End of Year Book  
Value:**

0

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

0

**TY 2022 IRS 990 e-File Render****Name:** HIMAN BROWN CHARITABLE TRUST**EIN:** 27-6669056

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BLUE ROCK INVESTMENT	AT COST	2,695,696	4,042,677
FRANKLIN SQUARE KKR CAPITAL CORP	AT COST	5,209,644	2,450,177
FRANKLIN SQUARE RE INC. CL Y	AT COST	1,563,041	1,527,763
GOLUB CAPITAL PARTNERS 11	AT COST	873,877	873,877
MORGAN STANLEY #761-143702 (BLACKSTONE R/E)	AT COST	1,087,001	2,311,214
MORGAN STANLEY 052-163655-704-TCB BDC II	AT COST	2,164,006	1,985,167
NYDIG - BITCOIN INVESTMENT	AT COST	299,873	206,338



# TY 2022 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	1,166,351	0		1,166,351

# TY 2022 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNT FEES	375	375		0
ADR FEES	891	891		0
DUES & SUBS	1,089	0		1,089
INSURANCE	12,615	0		12,615
MEMBERSHIP FEES	2,782	0		2,782
NY STATE FILING FEE	1,500	0		1,500
OFFICE EXPENSE	15,757	0		15,757
NON-DEDUCTIBLE EXP	356	0		0
PAYROLL PROCESSING	2,005	0		2,005

## TY 2022 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ENDURO ROYALTY TRUST	24	24	24
LITIGATION INCOME	683	683	683
OTHER INCOME	-2,006	-2,006	-2,006
L.P. K-1 FLOW THRU AMOUNT	54,294	54,294	54,294

**TY 2022 IRS 990 e-File Render****Name:** HIMAN BROWN CHARITABLE TRUST**EIN:** 27-6669056

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTING FEES-PENSION ADVISOR	25,000	0		25,000
CONSULTING FEES-PHILANTHROPIC ADVISOR	200,000	0		200,000
INVESTMENT ADVISORY FEES	310,919	310,919		0

## TY 2022 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	113,704	0		0
PAYROLL TAXES	8,780	0		8,780
FOREIGN WITHHOLDING TAXES	22,196	22,196		0